ELECTRONIC PROJECT MONITORING INFORMATION SYSTEM FOR KENYA (e-ProMIS Kenya)

ANALYTICAL INTERFACE

USER MANUAL

Version 3.0

SYNERGY INTERNATIONAL SYSTEMS

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1. INTRODUCTION

The purpose of this document is to describe how the *Electronic Project Monitoring Information System for Kenya (e-ProMIS Kenya)* application functions and provide the necessary instructions to ensure successful work with the application's analytical interface. Use of this document and compliance with the standards specified herein is mandatory for anyone working with the above-mentioned application.

2. OVERVIEW

The *Electronic Project Monitoring Information System for the Government of Kenya (e-ProMIS Kenya)* is an automated information management system which is designed to improve efficiency and transparency of national development planning and coordination of reconstruction activities within the country. It is also a powerful tool for tracking and analyzing aid flows. The system serves as the main database and reporting system for the government of Kenya, donor and NGO community as it ensures effective access to development data.

The main objective of *e-ProMIS Kenya* is to serve as a reliable and credible source of information on overall donor contributions to Kenya's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

e-ProMIS Kenya is a powerful tool that allows the user to view project data organised into lists, reports, and charts. In *e-ProMIS Kenya*, the user is able to present the project data in the form of list and chart reports, memorize/save the reports, print them, and export them into PDF, MS Word and MS Excel format files.

In the current design, *e-ProMIS Kenya* consists of the following applications:

- **Projects** – this application is designed to track the implementation of the development projects recorded. In this application, the user can view the project data, as well as add new projects or modify the information of existing projects.

- **Technical Assistance Personnel –** this application is designed to create technical assistance personnel profile, track and keep personal, background, technical assistance information and employment details.

- **Organisations Profile –** this application is designed to track the information on organisations (Development and Implementing Partners) providing assistance to the country or implementing projects in it. Once you have accessed this application, you are able to view organisation profile information and create analytical reports.

- **DA1 Form Submission** - this application in the *e-ProMIS Kenya* is designed to automate the DA1 form creation and processing. Once you have accessed this application, you can view DA1 form details and create different types of analytical reports.

- **M&E Results Profile -** this application provides information about the indicators recorded in the application.

Another essential feature of *e-ProMIS Kenya* is that the application is integrated with statistical packages designed for the system administrators who will use hits metrics to measure user activity in the application. The actions taken by the users in various modules and applications in *e-ProMIS Kenya* are recorded and stored in the database for data analysis, data management, and reporting.

The statistical packages in *e-ProMIS Kenya* are represented by two applications:

- **UAMS - Hits** – this application is designed to collect a wide range of user behavior statistics. It is a useful surveillance tool intended for the system administrators to gather aggregate performance statistics on user activity in the system as well as track system usage. The hits statistics is used by the system administrators with the aim of monitoring user activity and helping tighten security policies.

- **UAMS – Statistics** - this application is designed to track the number of users logged into the system within a specific period of time. The ability to collect information on the application traffic will assist the system administrators in troubleshooting performance problems, reducing system downtime, and increasing network performance.

For more information about the statistical packages within the *e-ProMIS Kenya* application as well as the description of the actions to be taken, please refer to STATISTICS IN E-PROMIS KENYA.

e-ProMIS Kenya provides a web-based user interface and requires a web browser (Internet Explorer 6.0 or higher) pre-installed.

3. WHO USES e-ProMIS?

The table below lists the groups of users that might be accessing and managing the *e-ProMIS* application:

Users Group	Who are they?	Why they need e-ProMIS access?
Administrators	*e-ProMIS* administrators	Access to the entire data stored in *e-ProMIS*, including the User Activity Monitoring System (UAMS) information.
EAD	Users of the Economic Affairs Department of the Ministry of Finance (MoF) of Kenya group	Access to the entire data stored in *e-ProMIS*, responsible for the DA1 Form processing.
ERD	Users of the External Resources Department of the Ministry of Finance (MoF) of Kenya group	Access to the entire data stored in *e-ProMIS*, responsible for the DA1 Form processing.
Implementing Ministry	Users Implementing Agency group	Responsible for reviewing the DA1 Form and its further processing.
Funding Source	Users of the Funding Source group	Responsible for creating a new DA1 Form with all the required data and verifying it.
Public	Users of the Public group	All data in the *e-ProMIS* is visible to the public user, except the following applications: • Implementing Agencies • M&E Results Profile • UAMS - Statistics • UAMS - Hits **Note:** MoF is in charge to define further restrictions as necessary.

For each user group, a specific role is assigned by the *e-ProMIS* system administrator, in accordance to the requirements. Depending on the role, users get certain permissions to add, edit or modify and view entries in the *e-ProMIS* application.

Note: If you do not have enough permission to perform certain actions, please refer to your project coordinator or system administrator.

4. LOGGING INTO e-ProMIS KENYA APPLICATION

The starting screen of *e-ProMIS Kenya* is the *Login Screen* (Figure 1). To log in, you should validate yourself with the username and password and then click the **Login** button.

Note: The password is case sensitive.

Note: If you have failed to log in one or more times, the system will be blocked. Contact your system administrator in order to unlock your user access. The number of unsuccessful login attempts is configured from the Administration Center (see *e-ProMIS Kenya Administration Center User Manual* in REFERENCES).

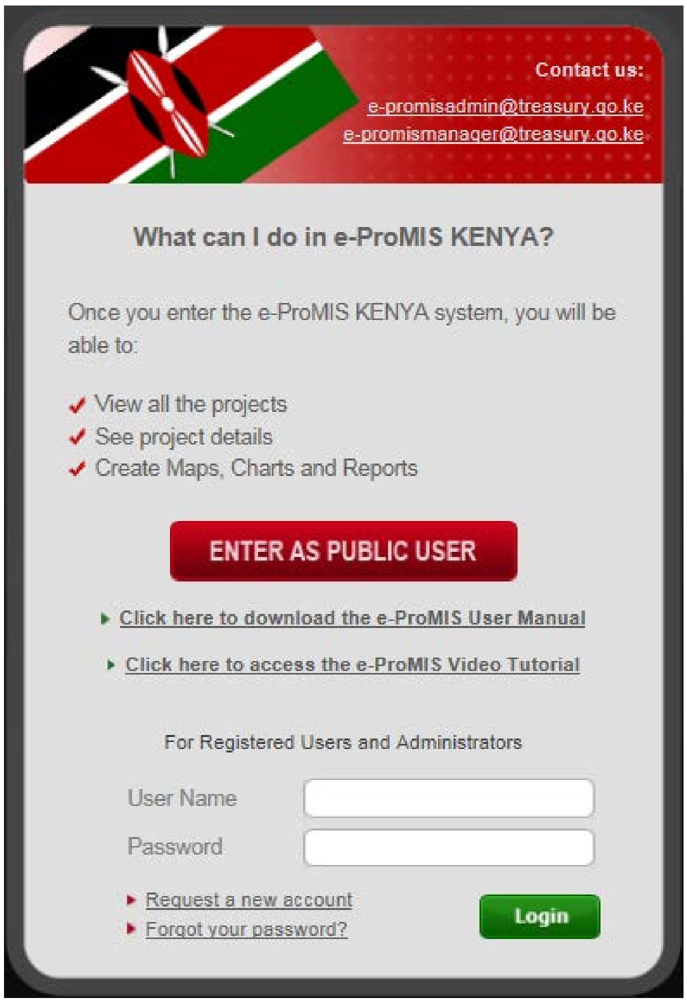


Figure 1: e-ProMIS Kenya Login Screen

A successful login directs you to the *My Portfolio* module.

Note: If you have forgotten your password, you can retrieve it by clicking the **Forgot your password?** link in the *Login Screen* and confirming your identity. After submitting your identity information, you will receive a password to the e-mail account indicated.

4.1 Registering a New User

If you are new to the system and you need a personal account, sign up for a username and password to start using the system.

In order to register in the system, follow the steps below:

1. Click the **Request a new account** link in the *Login Screen*. A *User Registration Form* will appear (Figure 2).
2. Fill in the information requested.
3. Click the **Submit** button to submit the inserted information.

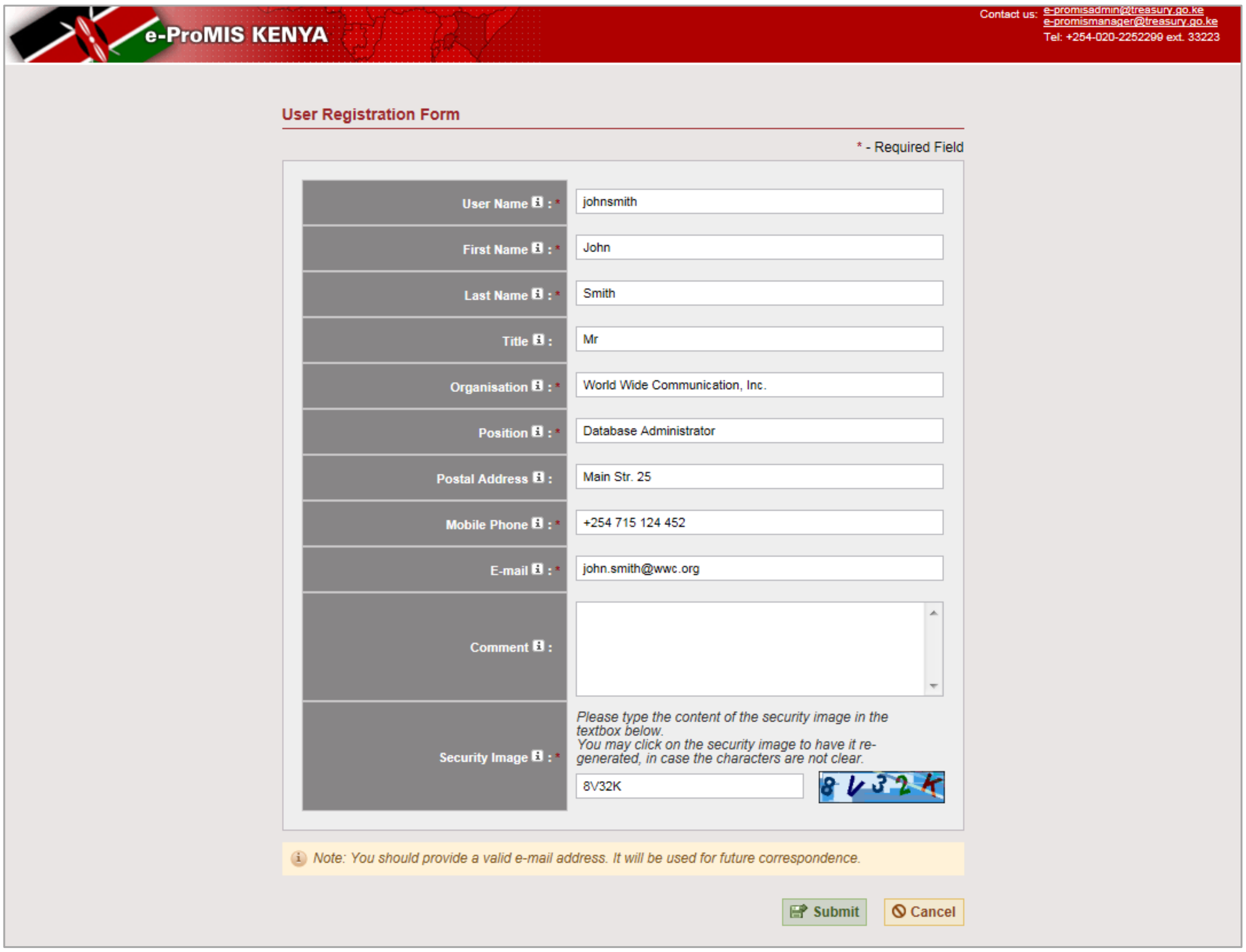


Figure 2: User Registration Form

Once you submit the registration form, the *e-ProMIS Kenya* administrator receives a notification. The administrator will review the information submitted and either approve the application or reject it. In case the application is approved, you will receive an e-mail message to the provided e-mail address. The e-mail will contain your login information details (username and automatically generated password) and the link to the *e-ProMIS Kenya* login page.

Once logged in with the received username/password, you can manage your details, i.e. change personal data and the password. To edit personal details, log into the application, go to the *My Profile* section (Figure 3) and make the appropriate changes.

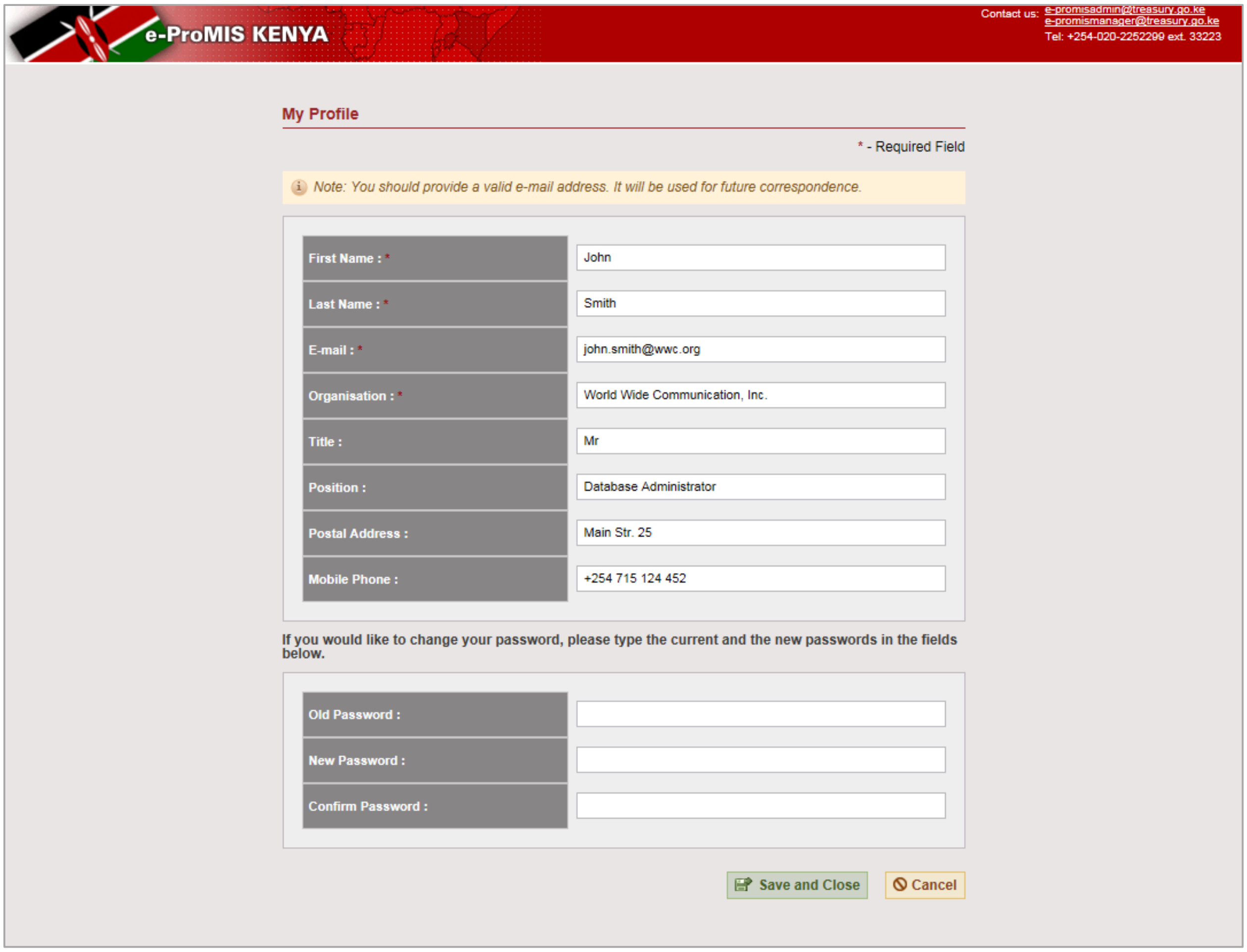


Figure 3: My Profile Section

4.2 Accessing e-ProMIS Kenya without Registration

To ensure more flexibility and to provide access to a wider range of users, the system is designed in such a way that it allows public users to enter it without registration.

Public users wishing to view data should click the **ENTER AS PUBLIC USER** button in the *Login Screen* (Figure 1). They will be directed to the *List* module of the application.

5. e-ProMIS KENYA ANALYTICAL INTERFACE STRUCTURE

e-ProMIS Kenya consists of the following main sections:

- MY PORTFOLIO MODULE – used for quick access to the project and technical assistance personnel records registered in the *e-ProMIS Kenya* system by the user's group.
- LIST MODULE – used to create and execute ad-hoc queries on the data and to acquire results in the form of a list.
- CHART MODULE – used to filter and display the data in a chart form.
- REPORT MODULE – used to generate complex reports over one or more criteria and presents the output in the printable and user-friendly format.
- DASHBOARD MODULE - used for quick access to the data registered in the *e-ProMIS Kenya* system.

The main window in *e-ProMIS Kenya* has a complex preview as it is shown in Figure 4.

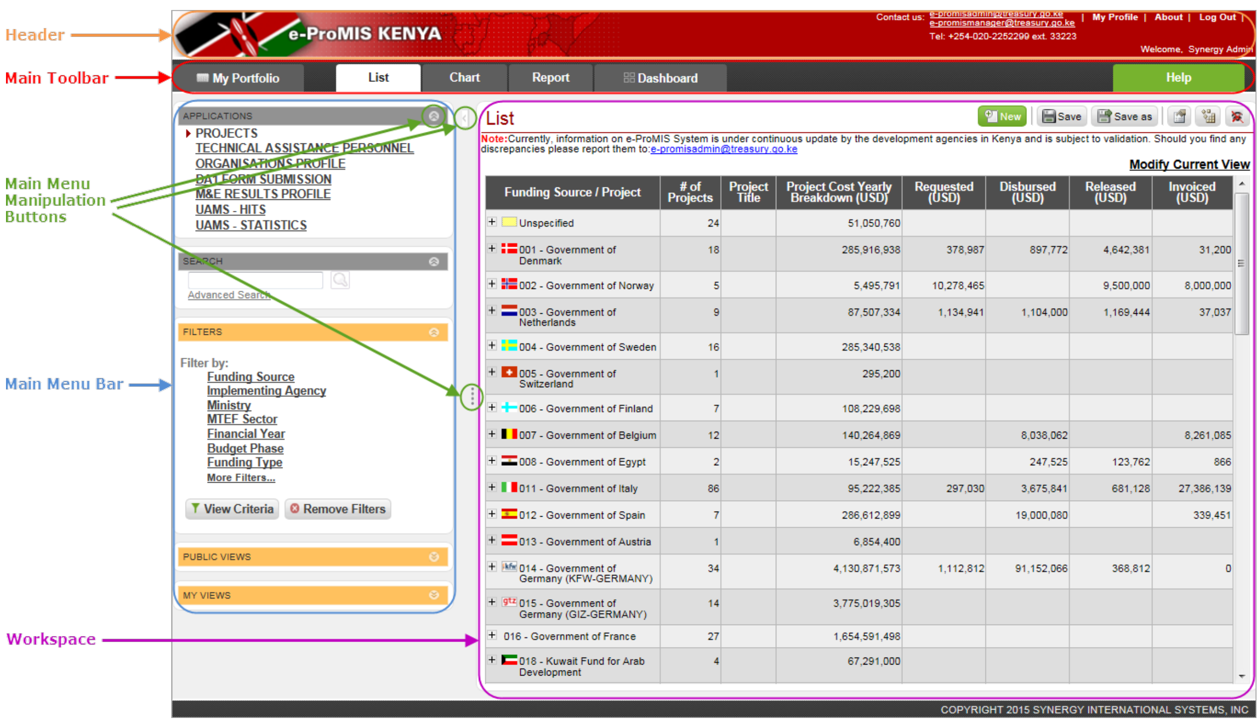


Figure 4: e-ProMIS Kenya Analytical Interface Structure

It contains the following components:

Component Name	Description
Header	This is the application header that contains application name and the *e-ProMIS Kenya* logo. On the right side, the following functions are available:

	• **Contact Us** – contact details (e-mail address and telephone number) of the *e-ProMIS Kenya* system administrator. • **My Profile** – this opens your personal settings and details. For details, see Registering a New User. • **About** – opens *e-ProMIS Kenya* information window. • **Log Out** – this button is used to log off the application.
Main Toolbar	This is the main toolbar of the *e-ProMIS Kenya* application. The following tabs are available here: • **My Portfolio** – opens MY PORTFOLIO MODULE to manage user specific projects. • **List** – opens the LIST MODULE. • **Chart** –opens the CHART MODULE. • **Report** - opens the REPORT MODULE. • **Dashboard** – opens the DASHBOARD MODULE. • **Help** – opens *e-ProMIS Kenya* online help.
Main Menu Manipulation Buttons	• **Left/Right arrows** () – used to hide/open the Main Menu bar. • **Up/Down arrows** () – used to collapse/expand the section in the Main Menu bar. • **Frame Divider** – used to adjust the width of the Main Menu bar.
Main Menu Bar	This menu contains sections with main functions of the *e-ProMIS Kenya* application: • **Applications** – allows choosing the application to work with. • **Search** – contains a common and advanced search functions among the selected application list. For details, see SEARCH. • **Filter** – contains filtering options. For details, see FILTERING. • **Public Views/Charts/Reports** – memorized views / charts / reports (depending on the opened module) available to all users of the application. • **My Views/Charts/ Reports** – memorized views / charts / reports (depending on the opened module) created by and available to the current user only.
Workspace	In this frame, all applications and modules are managed. Here are filtering and search results displayed.

6. MY PORTFOLIO MODULE

The *My Portfolio* module (Figure 5) of the *e-ProMIS Kenya* application gives quick access to the projects added by the corresponding user or other users from the same group. Also, it provides information about the Technical Assistance Personnel that the user or the user group has permissions to manage.

In order to access the *My Portfolio* module, click the **My Portfolio** tab in the *Main Menu* of the *e-ProMIS Kenya* application. Editing permissions for records in *My Portfolio* can be based on the user (whether the user has created the record) or user's group (whether someone from the group user belongs to has created the record). All these permissions are granted and managed from e-ProMIS Kenya Administration Center (see *e-ProMIS Kenya Administration Center User Manual* in REFERENCES).

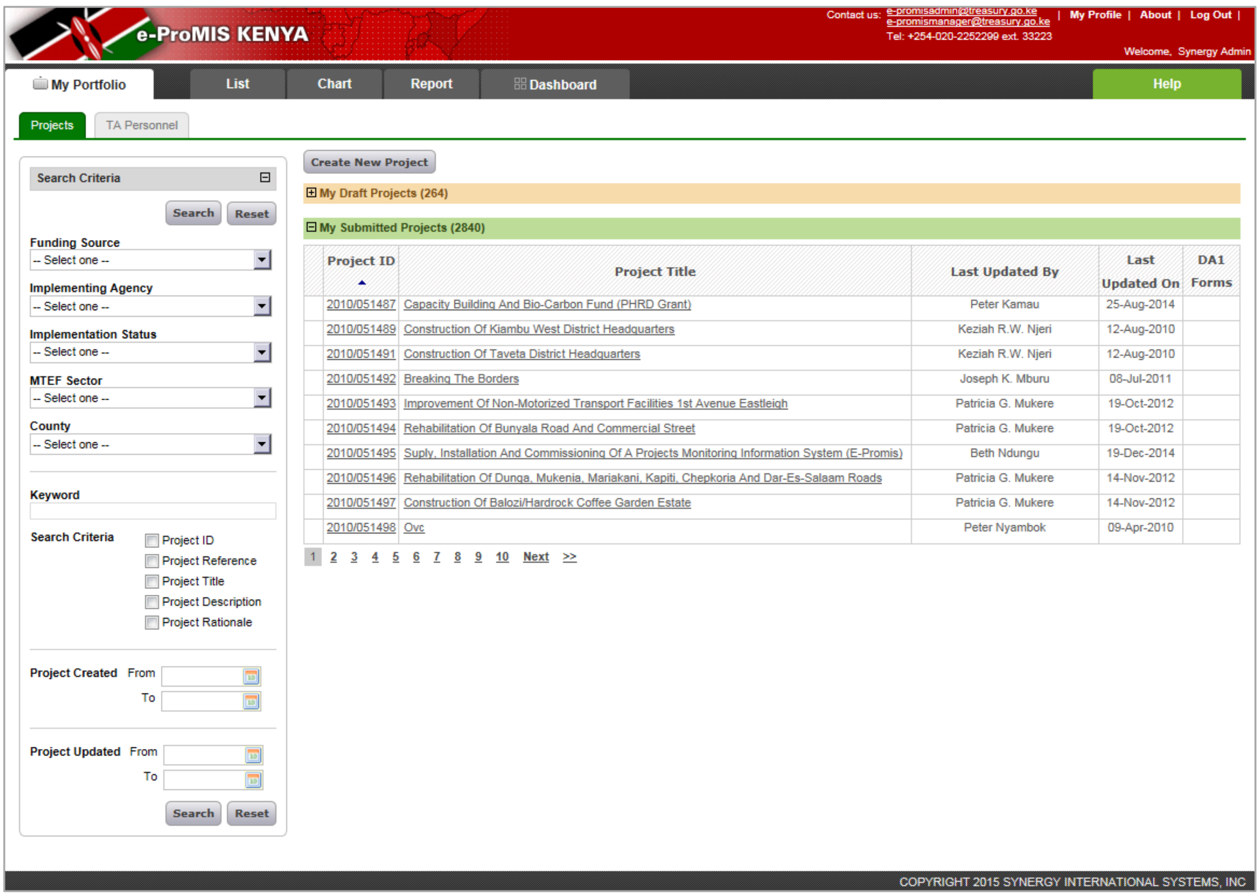


Figure 5: My Portfolio Module

The *My Portfolio* module consists of the following sections (Figure 5):

- **Projects** – this section is used to manage and maintain the projects that the current user has permissions to access. Moreover, it gives the user the possibility of creating new projects aiming to support the reconstruction and social development in Kenya. For more details on how you can maintain project records, see Managing Projects.

- **TA Personnel** – this section is used to manage and maintain the records for the technical assistance personnel involved into different projects that are implemented in the country. For more details on how you can add and view the Technical Assistance Personnel (TA Personnel) records, see Managing TA Personnel.

6.1 Managing Projects

The *Projects* section in the *My Portfolio* module (Figure 6) displays the list of draft and submitted projects that are currently implemented in the country or are planned for implementation. The content of the list is determined by the projects that either you or any other member of the user group that you belong have created and can manage.

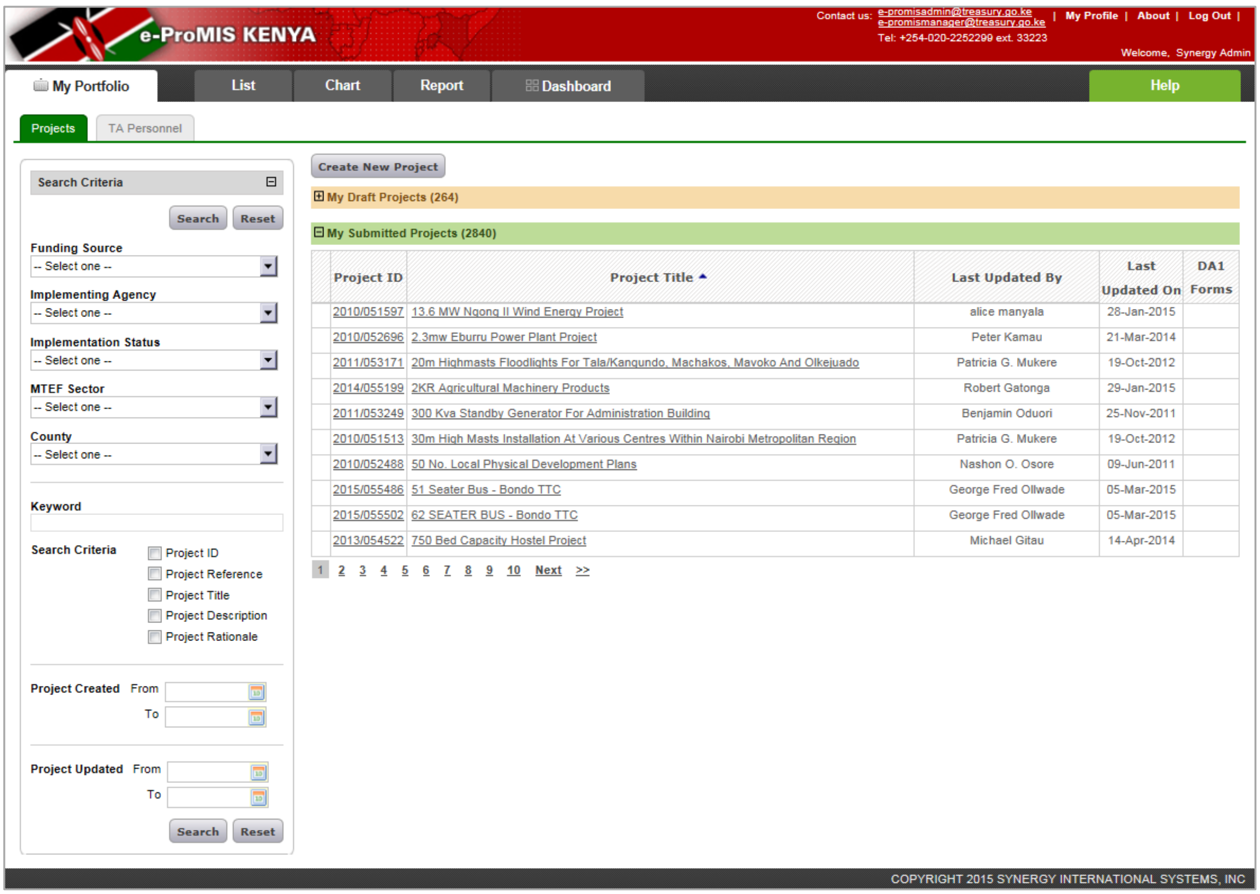


Figure 6: Projects Section of the My Portfolio Module

The information displayed in the *Projects* section of the *My Portfolio* module for each draft project includes the following:

- **Status** – the current status of the project. The projects that are not yet ready for submission are highlighted in the red and marked with icon. The projects that are ready for submission appear in the black.
  Note: The projects that are locked for editing have icon to the left of their names.
- **Project ID** – the project reference number,

- **Project Title** – the title of the project,
- **Last Updated By** – the author of the latest modifications,
- **Last Updated On** – the date of the latest modifications,
- **Submit** – shows whether the project is ready for submission. The projects that are ready for submission have **(Submit)** button displayed in this column. Clicking it, you will move the project to *My Submitted Projects* section.

The information displayed in the *Projects* section of the *My Portfolio* module for each submitted project includes the following:

- **Status** – the current status of the project. The projects that are locked for editing have icon to the left of their names,
- **Project ID** – the project reference number,
- **Project Title** – the title of the project,
- **Last Updated By** – the author of the latest modifications,
- **Last Updated On** – the date of the latest modifications,
- **DA1 Forms** – the DA1 forms related to the project.

In the *Projects* section, you can create new project records and view or edit the details of the existing ones; add and process new DA1 forms, etc.

6.1.1 Adding a New Project

To add a new project from the *Projects* section of the *My Portfolio* module, follow the steps below:

1. Go to the *My Portfolio* module.
2. Navigate to the **Projects** tab.
3. Click the **Create New Project** button (Figure 7). This will open a *Project* data entry form, which is described in *e-ProMIS Kenya Projects Application User Manual* in REFERENCES.
4. Enter the data requested in the form and save it.

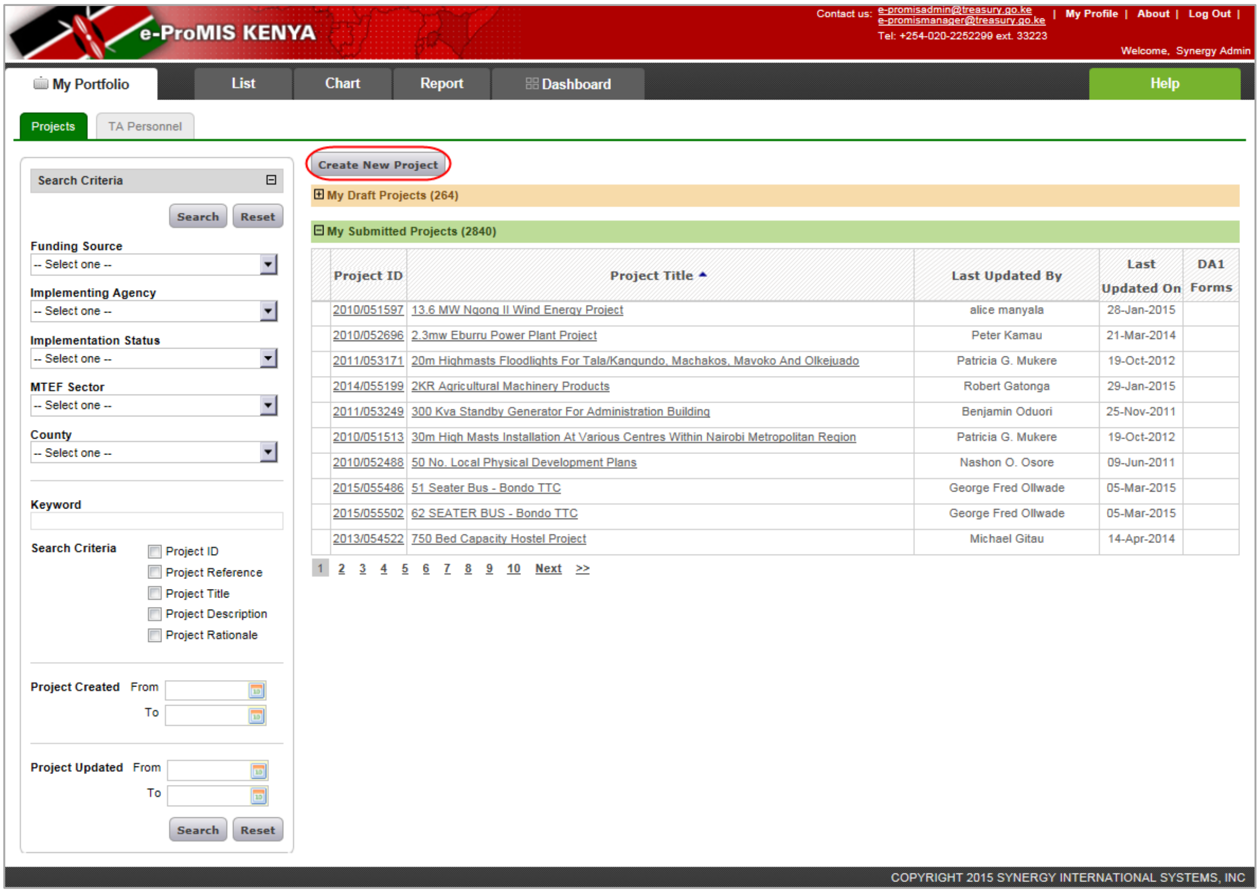


Figure 7: Create New Project Button in My Portfolio

6.1.2 Viewing Project Details

Depending on your permissions, you may also view or edit project details added by other users.

To view details of the projects listed in the *Projects* section of the *My Portfolio* module, follow the steps below:

1. Go to the *My Portfolio* module.
2. Navigate to the **Projects** tab (Figure 5).
3. Expand the corresponding **My Draft Projects or My Submitted Projects** list.
4. Click the project you wish to see the details for. This will open the project details. For more information, see DETAILS SECTION.

6.1.3 Searching for a Project

You may perform searching among the projects in the *Projects* section of the *My Portfolio* module by specifying one or more search criteria under the respective section in the left area of the screen, and results will appear on the right side of the screen (Figure 8).

The following criteria are available:

- **Funding Source** – used to search the projects by the specified Funding Source.
- **Implementing Agency** – used to search the projects by the specified implementing organisation/agency.
- **Implementation Status** – used to search the projects by status.
- **MTEF Sector** – used to search the projects by sector of economy they are supporting.
- **County** – used to search the projects by location they are supporting.
- **Keyword** – used to search the projects by the keywords. You may want to search the indicated keywords in the **Project ID**, **Project Reference**, **Project Title**, **Project Description** and/or **Project Rationale** fields.
- **Project Created (From)/ Project Created (To)** – used to filter the projects by the date or the range of dates the project was created on. A calendar pop-up is available for these fields, see Figure 9: Calendar.
- **Project Updated (From)/ Project Updated (To)** – used to filter the projects by the date or the range of dates the project was updated on. A calendar pop-up is available for these fields, see Figure 9: Calendar.

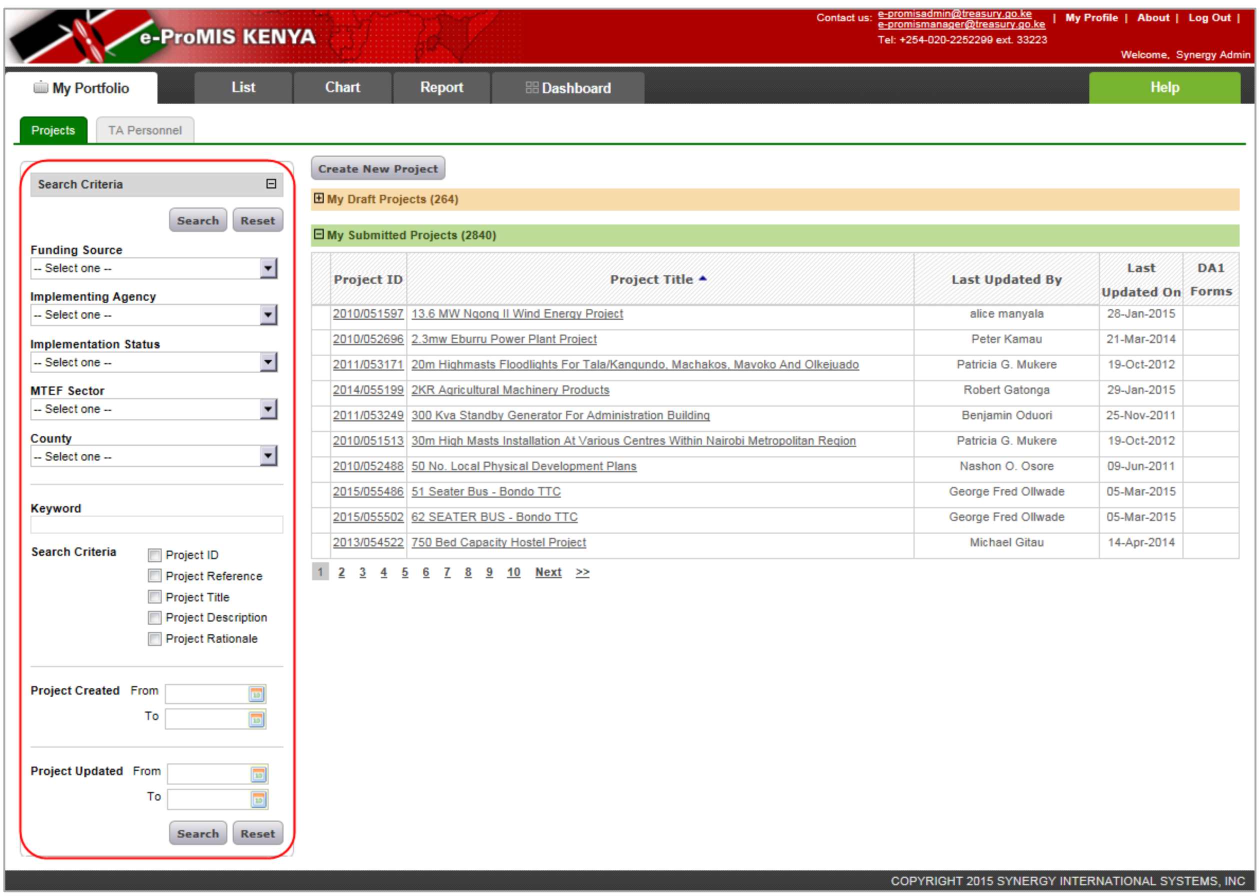


Figure 8: Search Criteria in the Projects Section

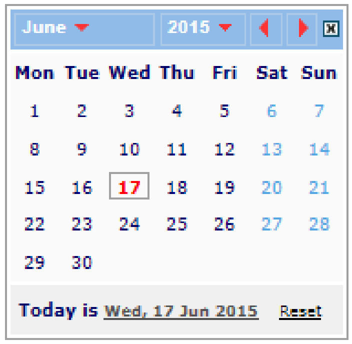


Figure 9: Calendar

Once one or more criteria are selected (Figure 8), press **Search** to see the filtered list of projects.

To clear all search criteria previously selected, press the **Reset** button.

To view the project details in the *Projects* section of the *My Portfolio* module, click the project to show the details for (Figure 8). This will open the project details window, see DETAILS SECTION.

Note: If this search option does not fulfill your needs, you may refer to the advanced search under the *List*, *Chart*, and *Report* modules of *e-ProMIS*, which will allow you for retrieving results based on all fields that captured and recorded through the system.

6.1.4 Adding a New DA1 Form

To add new DA1 Form, follow the steps below:

1. Go to the *My Portfolio* module.
2. Navigate to the **Projects** tab.
3. Expand the **My Submitted Projects** list
4. Click the **Create New** button next to the selected project (Figure 10). This will open a *DA1 Form Submission* data entry form, which is described in *e-ProMIS Kenya DA1 Form Submission Application User Manual* in REFERENCES.
   Note: The DA1 Form can only be created from the *My Portfolio* module by the user with the corresponding permissions granted from e-ProMIS Kenya Administration Center (see *e-ProMIS Kenya Administration Center User Manual* in REFERENCES).
5. Enter the data requested in the form and save it.

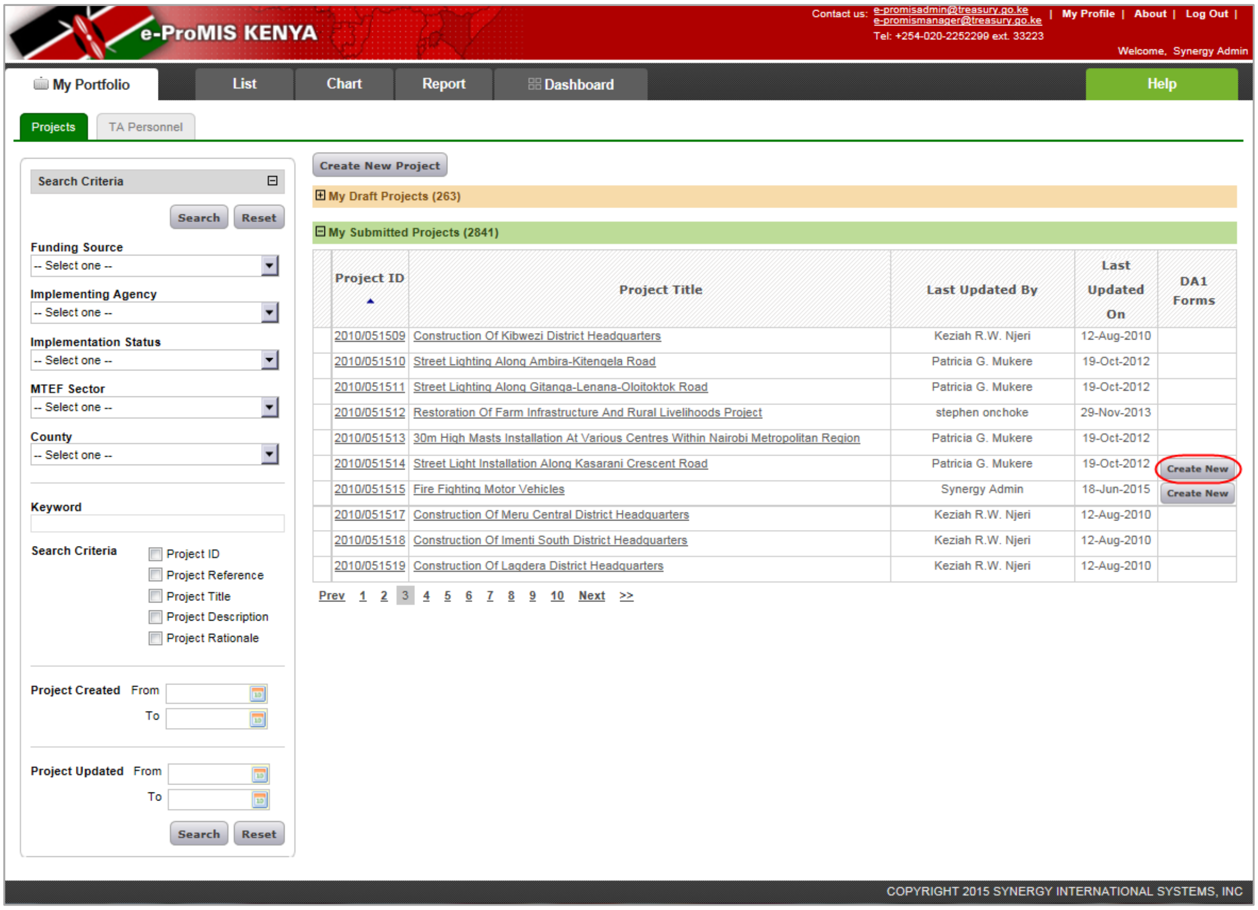


Figure 10: Create New DA1 Form Button in My Portfolio

6.1.5 Viewing DA1 Form Details

Depending on your permissions, you may also see or edit DA1 Form details added by other users.

To view the details of the DA1 Forms listed in the *My Portfolio* module, follow the steps below:

1. Go to the *My Portfolio* module.
2. Navigate to the **Projects** tab.
3. Expand the **My Submitted Projects** list (Figure 6).
   Note: The DA1 Forms requiring your attention are listed above the list.
4. Click the DA1 Form you wish to see the details for. This will open DA1 Form details window, see *e-ProMIS Kenya DA1 Form Submission Application User Manual* in REFERENCES.

6.1.6 DA1 Form Submission Workflow

The *e-ProMIS* facilitates the submission and processing of the DA1 Forms. The DA1 Forms are submitted by Funding Sources requesting duty and V.A.T. exemptions on projects assets that are either locally purchased or imported from abroad.

The DA1 Form submission and processing diagram is presented in Figure 11.

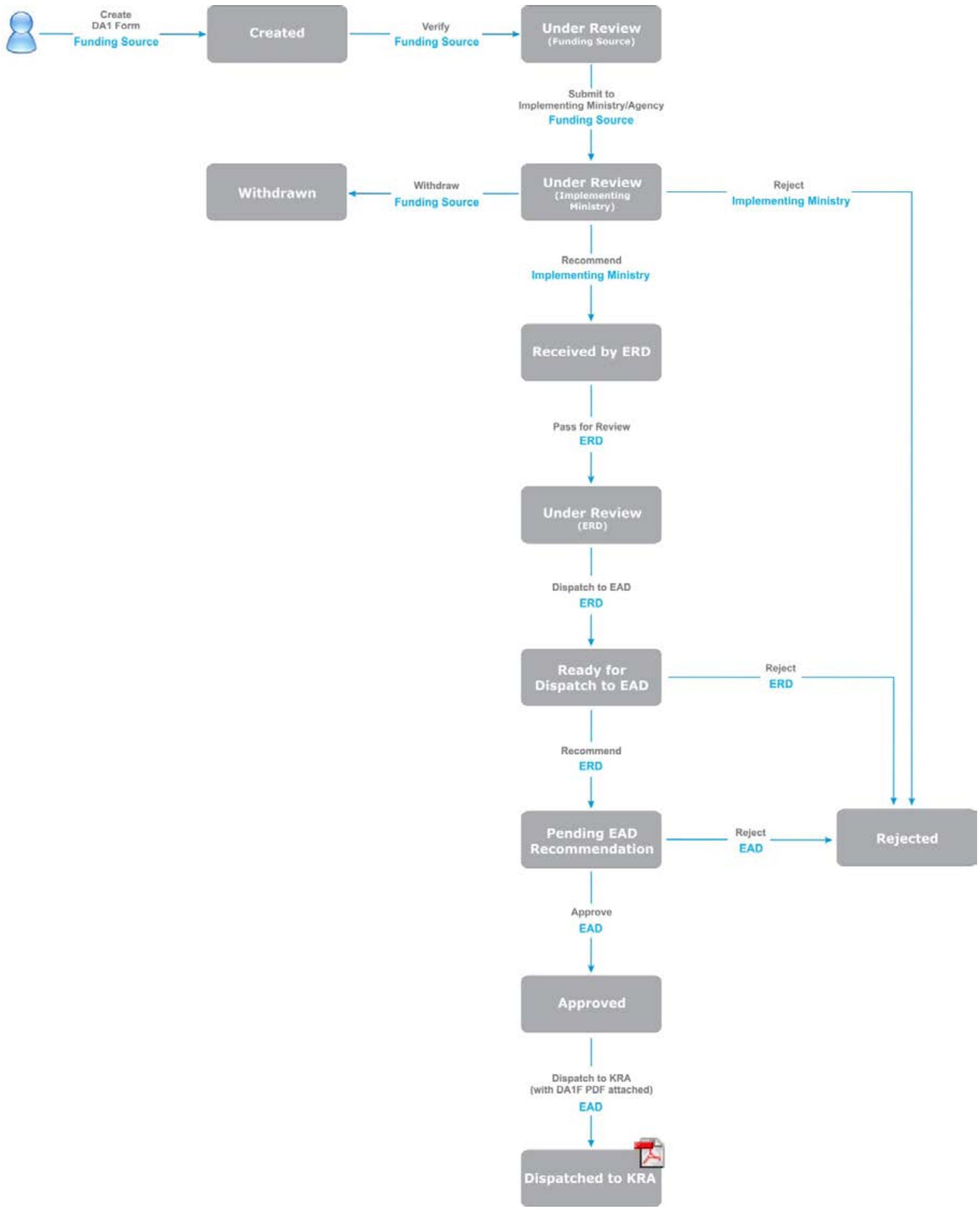


Figure 11: DA1 Form Submission Workflow

1. The Funding Source group user creates the DA1 form and verifies it by selecting the **Verify** option from the *Actions* list at the top of the form.
   Note: Upon verification, the remarks on the form can be provided.

2. The Funding Source group user submits the verified DA1 form to the Implementing Ministry for review by selecting the **Submit to Implementing Ministry/Agency** option from the *Actions* list of the form.
   Note: Upon submission, the remarks on the form can be provided.
   The Funding Source group user can withdraw their own DA1 forms after they are submitted. After this action, the DA1 form becomes under the state **Withdrawn**.
3. The Implementing Ministry group user reviews the DA1 form and either recommends it to the External Resources Department of the Ministry of Finance of Kenya (ERD) if agreed upon the items to be obtained, or rejects it if the acquisition of the items is not possible at the moment.
   Note: Upon taking the **Recommend/Reject** action, the remarks on the form can be provided.
4. The ERD group user revises the received DA1 form and dispatches it to the EAD (Economic Affairs Department of the Ministry of Finance of Kenya). At this state, the form can be either send to the EAD recommendation, or can be rejected.
   Note: Upon taking the **Recommend/Reject** action, the remarks on the form can be provided.
5. The EAD group user revises the DA1 form and approves if agreed upon the items to be obtained.
   Note: Upon approval, the remarks on the form can be provided.
6. The approved DA1 form is dispatched by EAD to the KRA by selecting the **Dispatch to KRA** option from the *Actions* list. This action will export the form into a PDF file. The exported PDF file will be automatically sent to the KRA by email.

6.2 Managing TA Personnel

The *TA Personnel* section of the *My Portfolio* module (Figure 12) has been designed to provide the users with the facility to manage the foreign nationals who are engaged into the implementation of various projects in Kenya. Moreover, the section gives the possibility of managing the entry permits for the project expatriate staff.

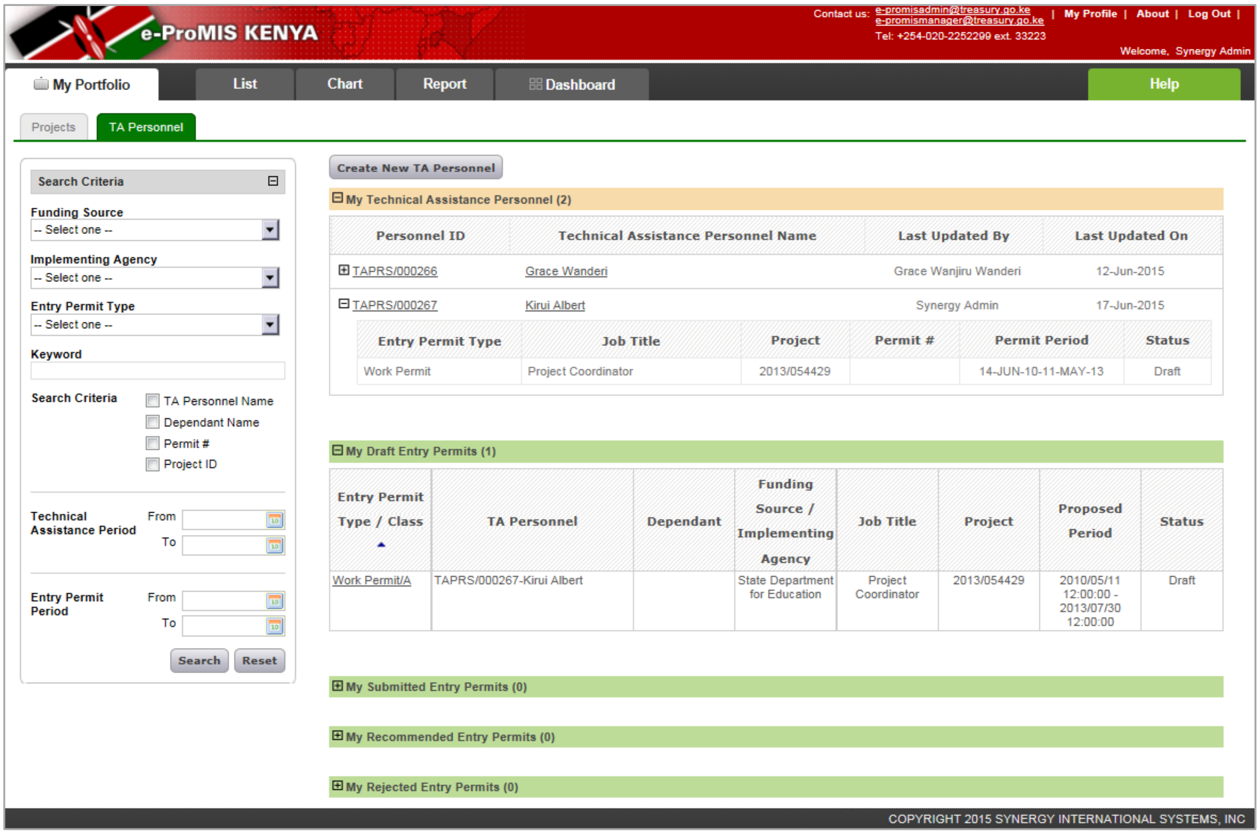


Figure 12: TA Personnel Section in My Portfolio

The information displayed in the *TA Personnel* section of the *My Portfolio* module for each record includes the following:

- **Personnel ID** – the unique ID assigned to the personnel,
- **Technical Assistance Personnel Name** – the name of the technical assistance personnel,
- **Last Updated By** – the author of the latest modifications,
- **Last Updated On** – the date of the latest modifications.

The information displayed in the *TA Personnel* section of the *My Portfolio* module for each entry permit record includes the following:

- **Entry Permit Type / Class** – the type / lass of the entry permit (e.g. Work Permit / B, Special Pass, etc.),
- **TA Personnel** – the ID number and full name of the technical assistance personnel,
- **Dependant** – the name of the dependant and the relationship to the technical assistance personnel,
- **Funding Source / Implementing Agency** – the funding source / implementing agency name,
- **Job Title** – the job title of the TA Personnel,
- **Project** – the title of the project the TA Personnel is related to,
- **Proposed Period** – the proposed period during which the permit is valid,
- **Status** – the current status of the entry permit.

In the *TA Personnel* section, you can add new TA Personnel records and view or edit the details of the existing ones, etc.

6.2.1 Adding a New Technical Assistance Personnel

To add new technical assistance personnel from the *My Portfolio* module, follow the steps below:

1. Go to the *My Portfolio* module.
2. Navigate to the **TA Personnel** tab (Figure 5).
3. Click the **Create New TA Personnel** button (Figure 13). This will open a *Technical Assistance Personnel* data entry form, which is described in *e-ProMIS Kenya Technical Assistance Personnel Application User Manual* in REFERENCES.
4. Enter the data requested in the form and save it.

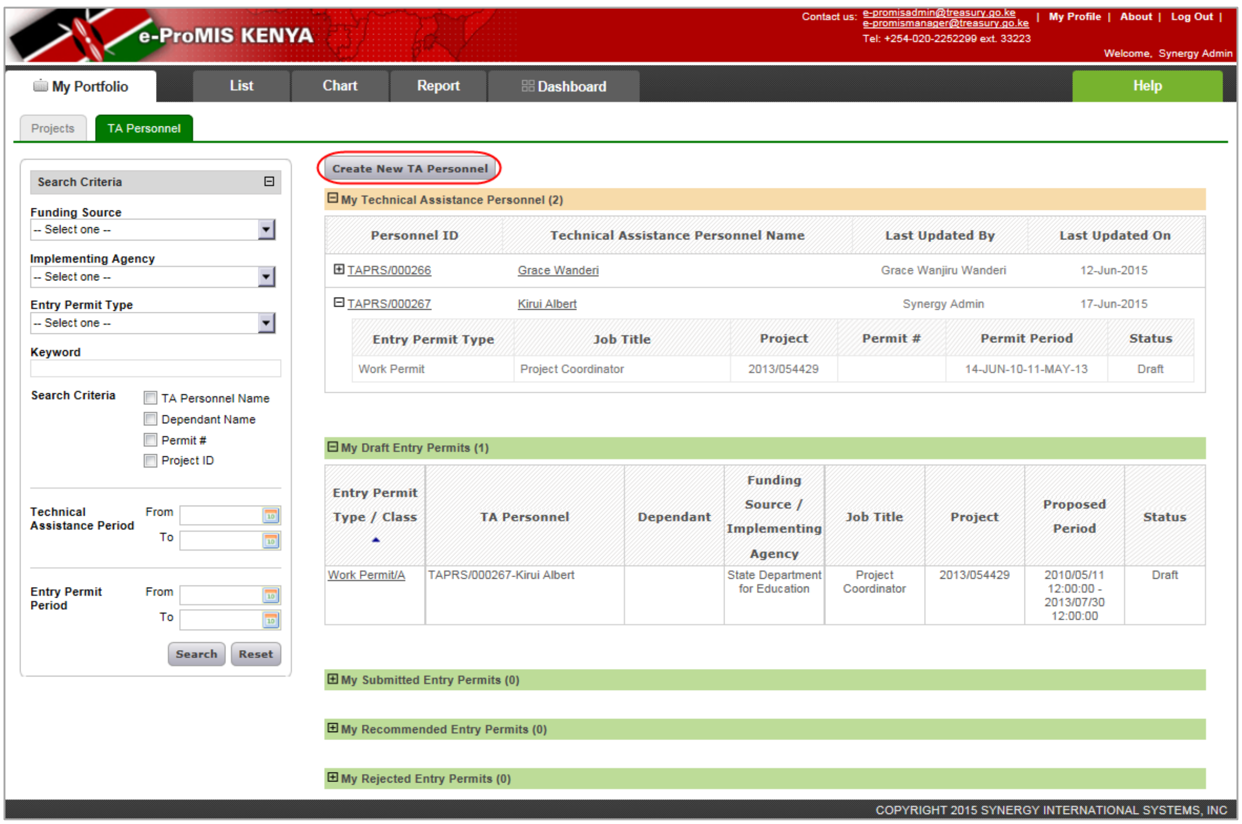


Figure 13: Create New TA Personnel Button in My Portfolio

6.2.2 Viewing TA Personnel Details

Depending on your permissions you may also view or edit TA Personnel details added by other users.

To view the details of the TA Personnel listed in the *TA Personnel* section of the *My Portfolio* module, follow the steps below:

1. Go to the *My Portfolio* module.

2. Navigate to the **TA Personnel** tab (Figure 5).
3. Expand the **My Technical Assistance Personnel** list.
4. Click the TA Personnel you wish to see the details for. This will open the TA Personnel details. For more information, see DETAILS SECTION.

6.2.3 TA Form Submission Workflow

The TA Forms submitted by Funding Sources / Implementing Agencies should go through a particular submission process. The TA Form submission diagram is presented in Figure 14.

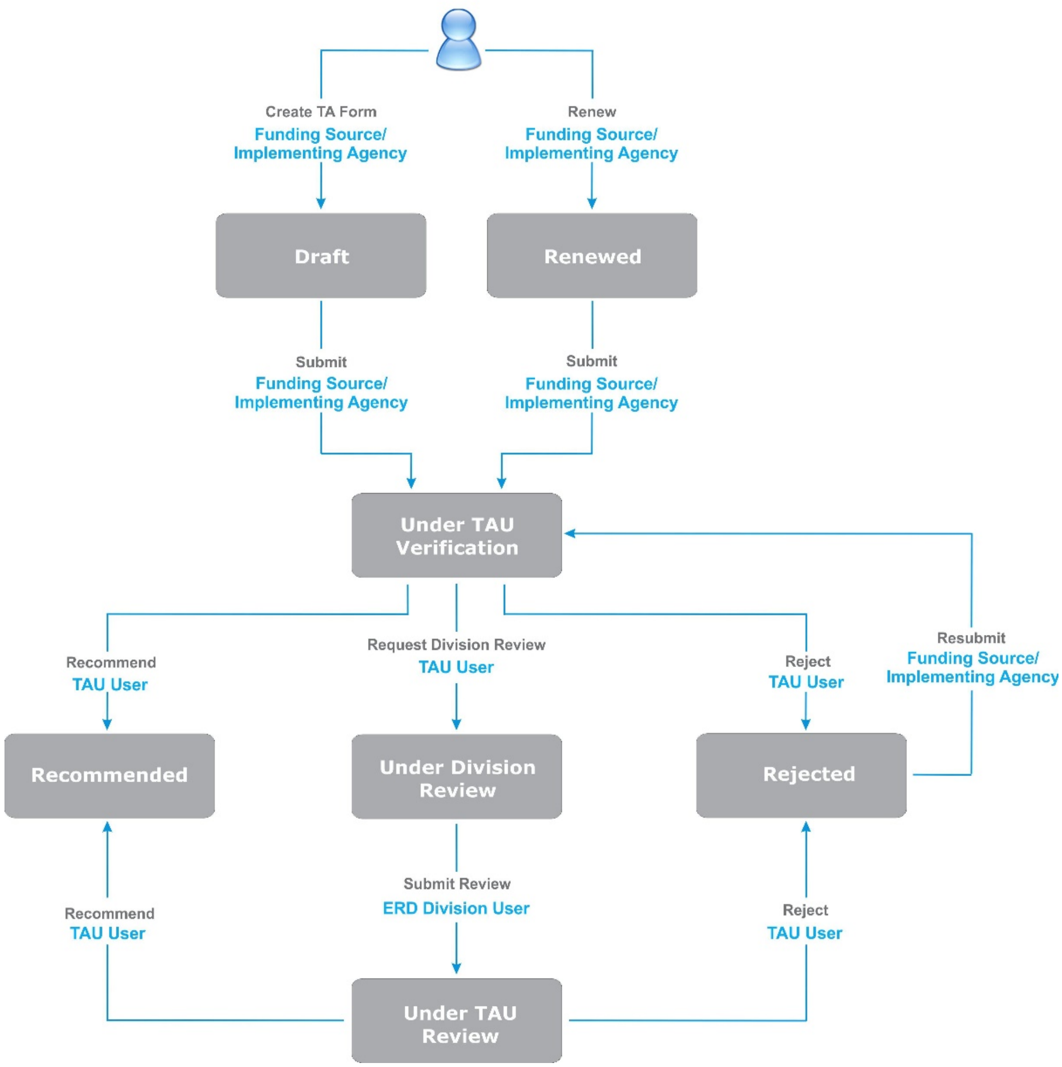


Figure 14: TA Form Submission Workflow

1. The Funding Source / Implementing Agency group user creates the TA form. Upon creation, the TA form is marked as **Draft**.
   Note: The Funding Source / Implementing Agency group user can renew the created TA form. This action is available only if the TA form requests the work type of permit and if there are no other permit application submitted. Once this action taken, the TA form is marked as **Renewed**.

2. The Funding Source / Implementing Agency group user submits the draft / renewed TA form to the Technical Assistance User (TAU) for verification by selecting the **Submit** option from the *Actions* list above the form.
3. The TAU User submits a request for division review for the TA form in the **Under TAU Verification** state. Once the action is taken, the TA form is marked as **Under Division Review**.
   Note: Upon taking the **Request Division Review** action, you can provide additional comments on the form as well as select the respective division.
4. When the division reviews the TA form, the ERD Division User sends it back to the Technical Assistance User by taking the **Submit Review** action. Once the action is taken, the TA form is marked as **Under TAU Review**.
   Note: Upon taking the action, you can provide additional comments on the form.
5. The TAU User can recommend the TA form in the **Under TAU Verification / Under TAU Review** state. Once the action is taken, the TA form is marked as **Recommended**.
   Note: Upon taking the **Recommend** action, you can provide additional comments on the form.
6. The TAU User can reject the TA form in the **Under TAU Verification / Under TAU Review** state. Once the action is taken, the TA form is marked as **Rejected**.
   Note: Upon taking the **Reject** action, you can provide additional comments on the form.
7. The Funding Source / Implementing Agency group user can resubmit the TA form. Once the action is taken, the TA form is marked as **Under TAU Verification**.

7. LIST MODULE

In the *List* module (Figure 15) of the *e-ProMIS Kenya* application, you can create and execute ad-hoc queries on project data, and acquire results in the form of a list.

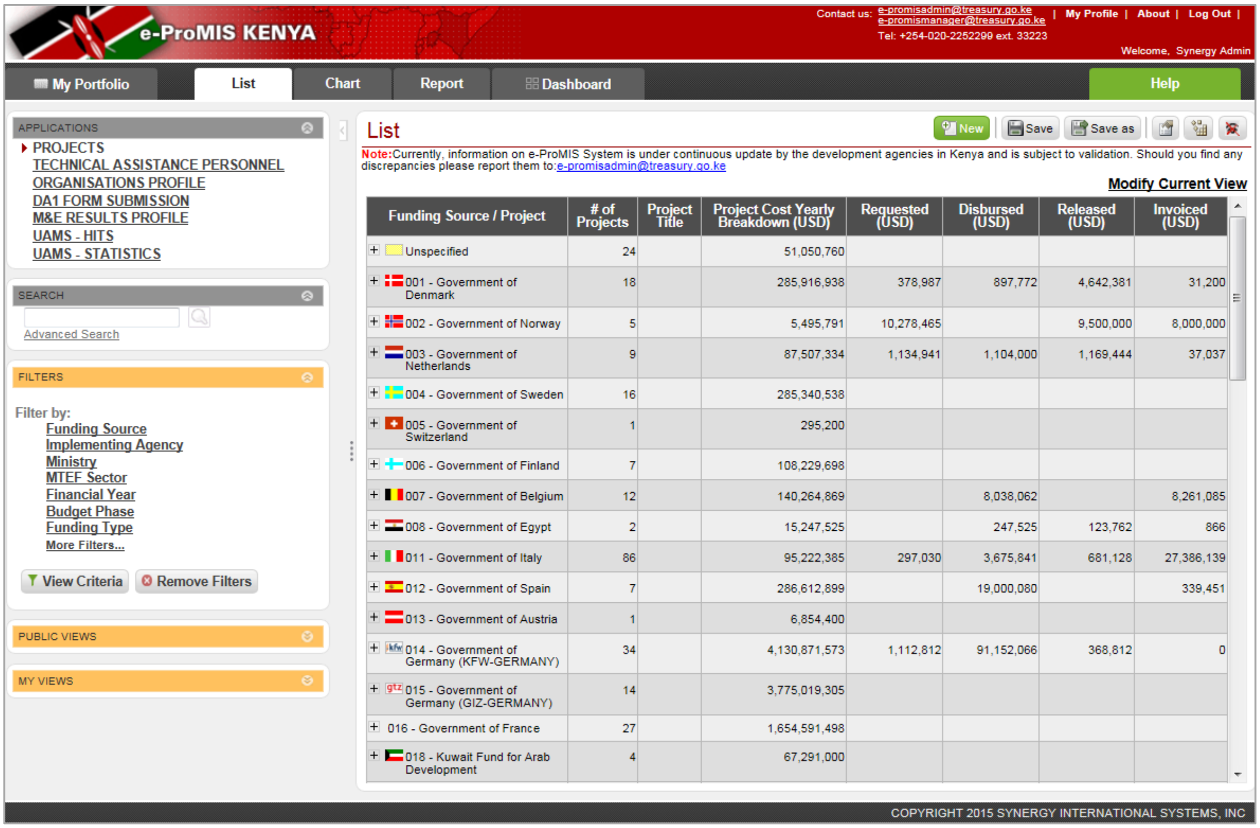


Figure 15: List Module

7.1 Accessing the List Module

A list consists of at least one group and one column, but the actual quantity of groups and columns is defined by the user's choice of view. Please, see Modifying the Current View for more details on how to define groups / columns of a list.

In order to access the *List* module, click the **List** tab. You will be navigated to the *List* module. In this module, you can view data organised according to the selected groupings and columns, modify the currently used list, save it as a pre-defined report, include it under a definite group, etc.

7.2 Expanding the List Item

It is possible to expand the list item level to view the information of the sub-level(s). In order to expand the list item level, click the '+' sign next to the name of the list item. This will expand the list item group level displaying the first sub-level (Figure 16). This can further be expanded unless there are no more sub-levels to be displayed.

Note: You can expand only one group level at a time. If you expand the group level of another list item, the previously expanded group level will get collapsed.

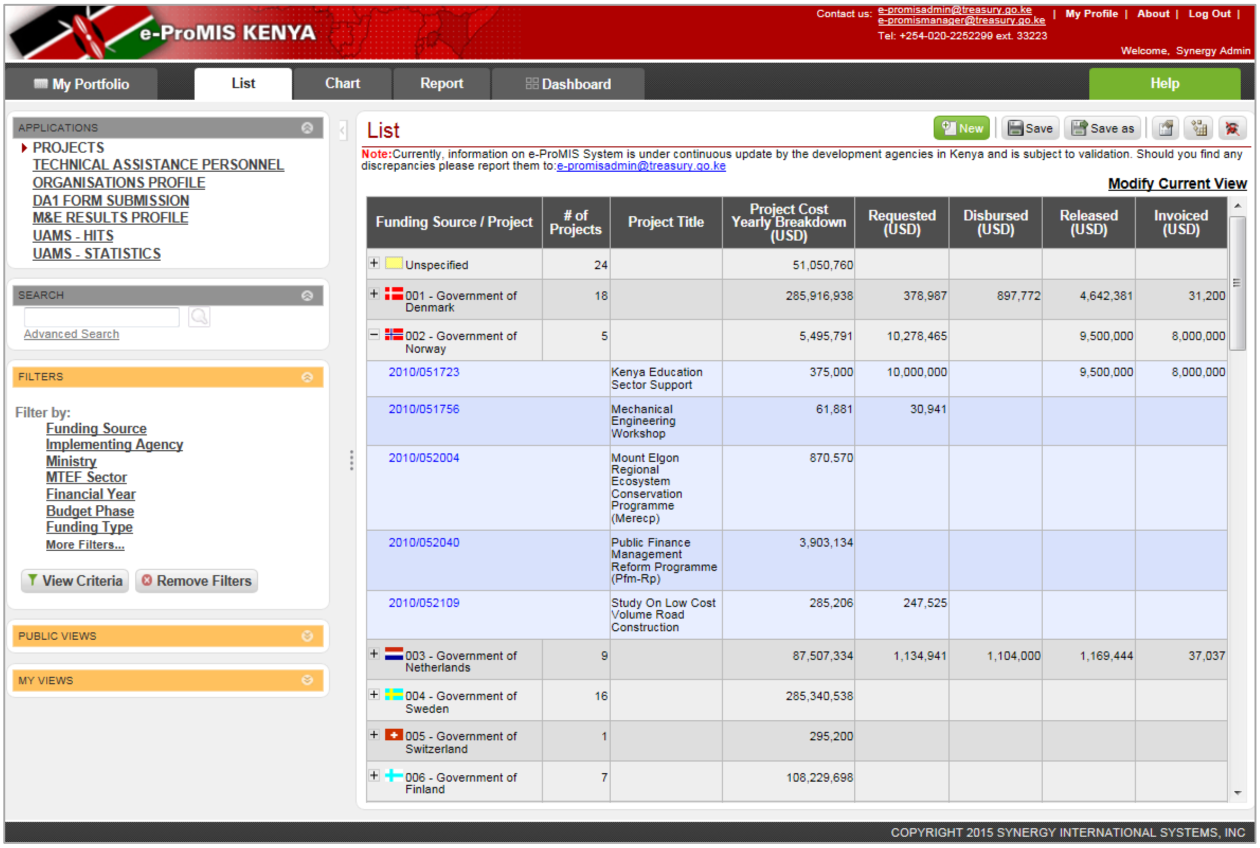


Figure 16: Expanding the List Item Level

7.3 Sorting List Items

You can sort the list view by column by clicking on the name of the column. This will sort the list alphabetically or numerically depending on the type of data entered into that column. The upward- or downward-pointing arrow that appears on the column can reverse the order of the list.

7.4 Browsing among List Items

You can browse among the list items by clicking on the number link of the page to navigate to. The **Previous** and **Next** buttons can be used to move to the required page.

7.5 Hiding / Showing Images in the List

In order to make the list load quicker, you can choose to hide the images which are displayed in the list. These images can be donor flags, sector icons, etc.

To hide the images in the list, click the  button located at the top of the screen (Figure 17). All the images in the screen will not display.

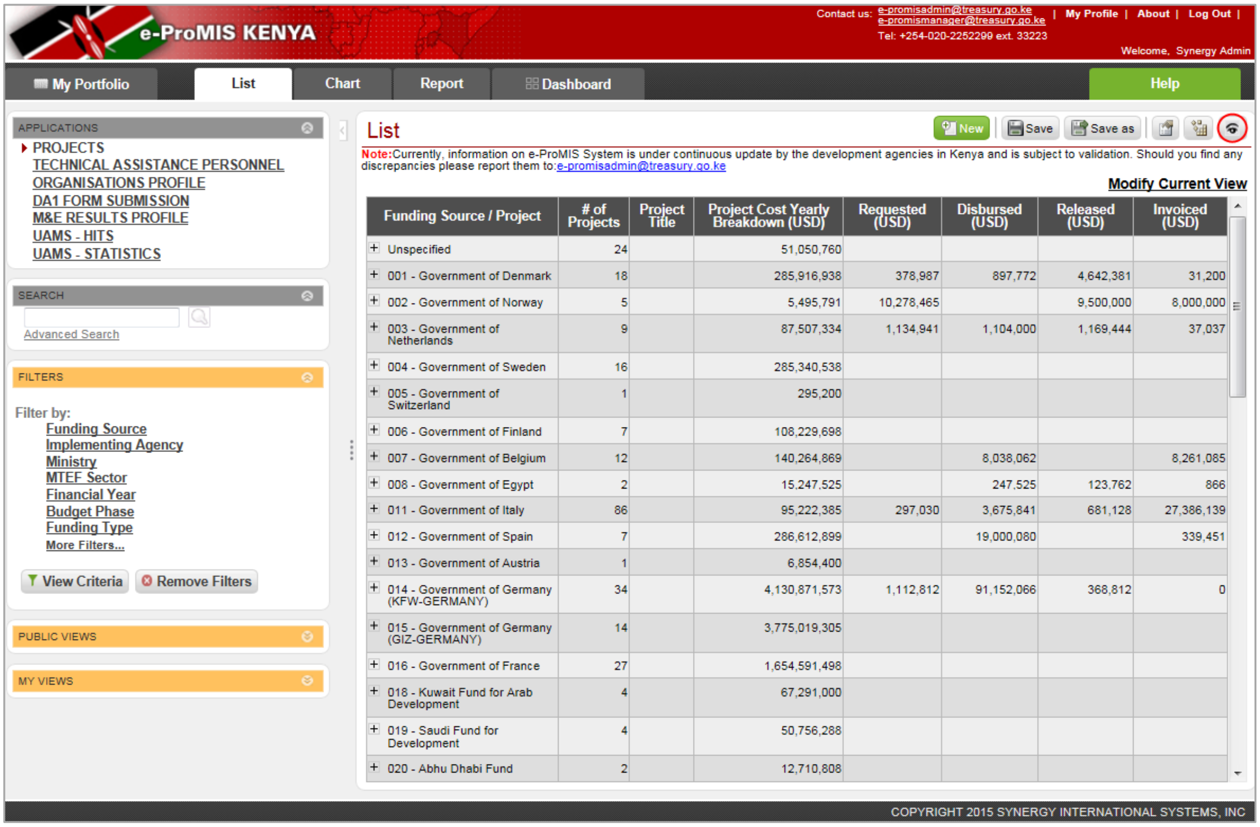


Figure 17: Hiding Images in the List

Note: Clicking the  button will show the images.

7.6 Modifying the Current View

It is possible to modify the list that is currently displayed in the List module. You can add new groupings to it or remove the selected ones, (un-) select columns, re-order them, etc.

The steps described below provide for the necessary instructions for modifying the current view.

1. Click the **Modify Current View** link at the top right corner of the *List* screen. A *Modify Current View* window (Figure 18) will appear presenting the administrator with the groupings/columns selected and available for the list view.
2. In the *Groupings* section, add / re-order / remove groups.
3. In the *Columns* section, add / re-order / remove columns.
4. In the *Cross Tab Groupings* section, define add / re-order / remove cross tab groupings for the view.
5. After finishing making changes in the view, click the **Ok** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.

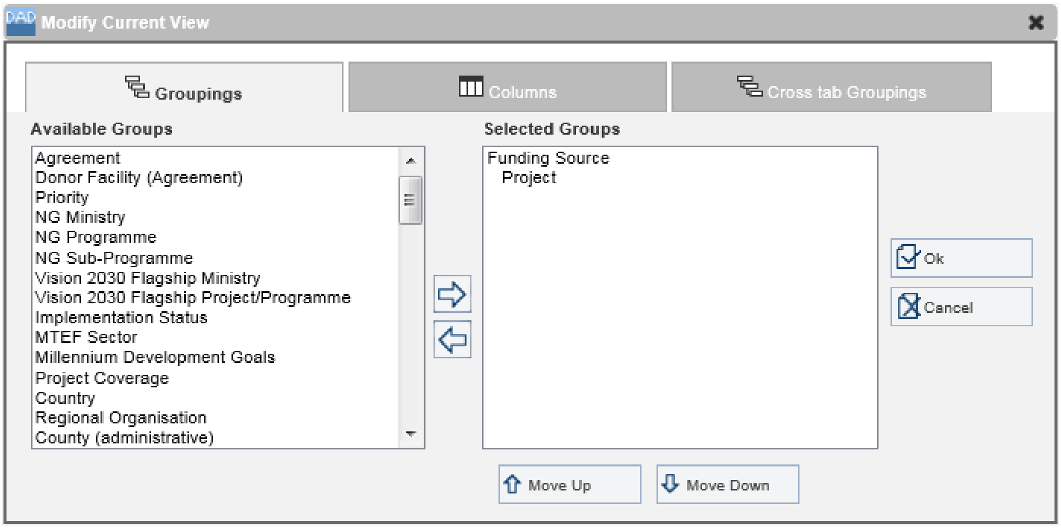


Figure 18: Modifying the Current View

7.6.1 Adding List Groupings / Columns / Cross Tab Groupings

In order to add a grouping / column / cross tab grouping to the list, follow the steps below:

1. In the *Available Groups / Columns* panel, select the grouping / column / cross tab grouping to be added to the list.
   Note: It is possible to select several groups / columns by means of the **Shift** or **Ctrl** keyboard buttons.
2. Click the  **(Select)** button. The selected group(s) / column(s) will appear in the *Selected Groups / Columns* panel.

7.6.2 Re-ordering Groupings / Columns / Cross Tab Groupings

In order to re-order the selected groupings / columns / cross tab groupings, follow the steps below:

1. Select the grouping / column / cross tab grouping that needs to be re-ordered in the *Selected Groups / Columns* panel.
2. Click the **Move Up / Move Down** button.

7.6.3 Removing Groupings / Columns / Cross Tab Groupings

In order to remove the selected groupings / columns / cross tab groupings from the list, follow the steps below:

1. In the *Selected Groups / Columns* panel, select the grouping / column / cross tab grouping that needs to be removed from the list.
2. Click the  **(Unselect)** button. The selected group(s) / column(s) will be removed from the *Selected Groups / Columns* panel.

7.7 Sample Views

In the following chapters, you can see several samples on list reports.

7.7.1 Sample View 1

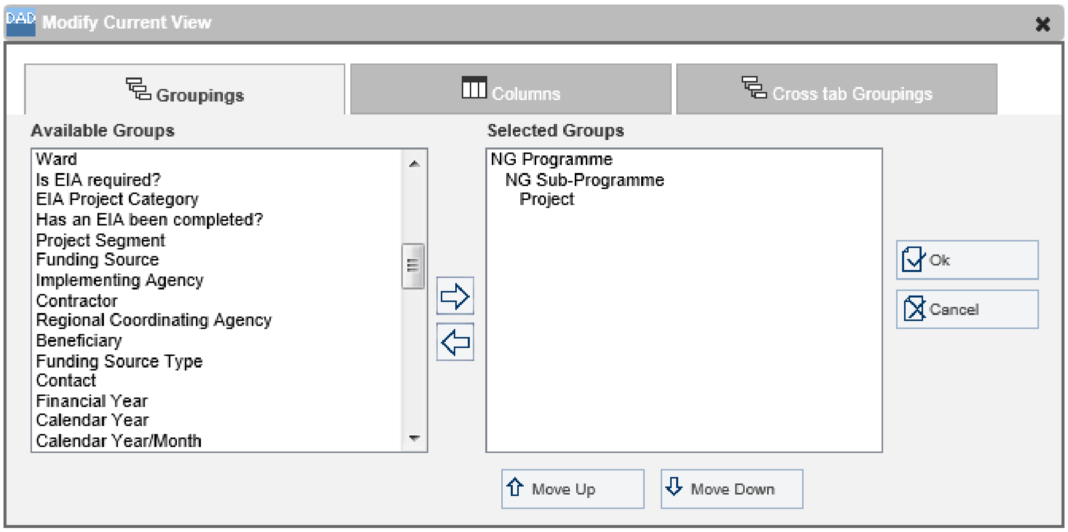


Figure 19: Defining List View Groupings for Sample View 1

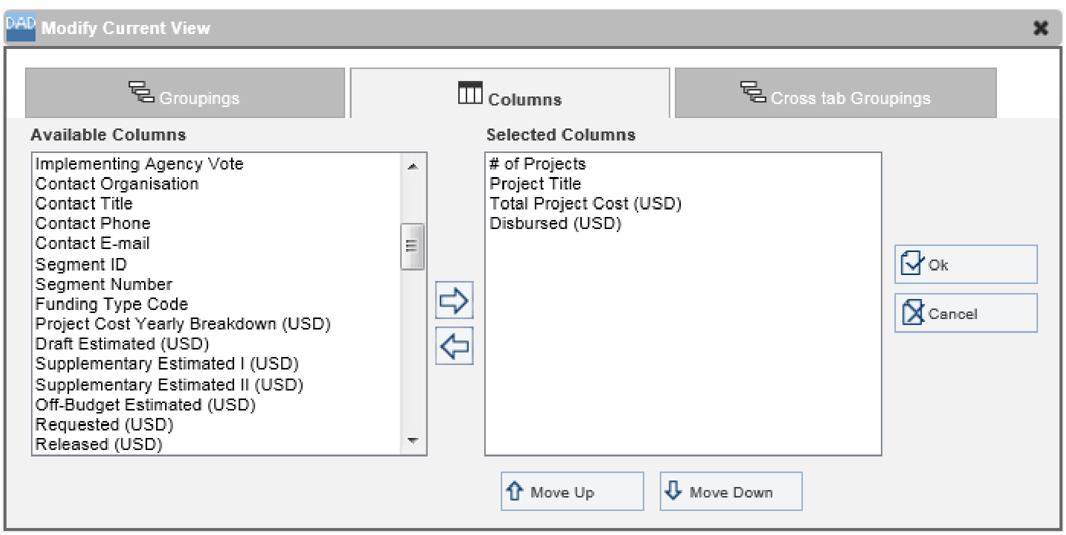


Figure 20: Defining List View Columns for Sample View 1

You will get the following result (Figure 21) if you have selected **NG Programme / NG Sub-Programme / Project** hierarchy as a grouping (Figure 19) and **# of Projects / Project Title / Total Project Cost (USD) / Disbursed (USD)** as columns (Figure 20).

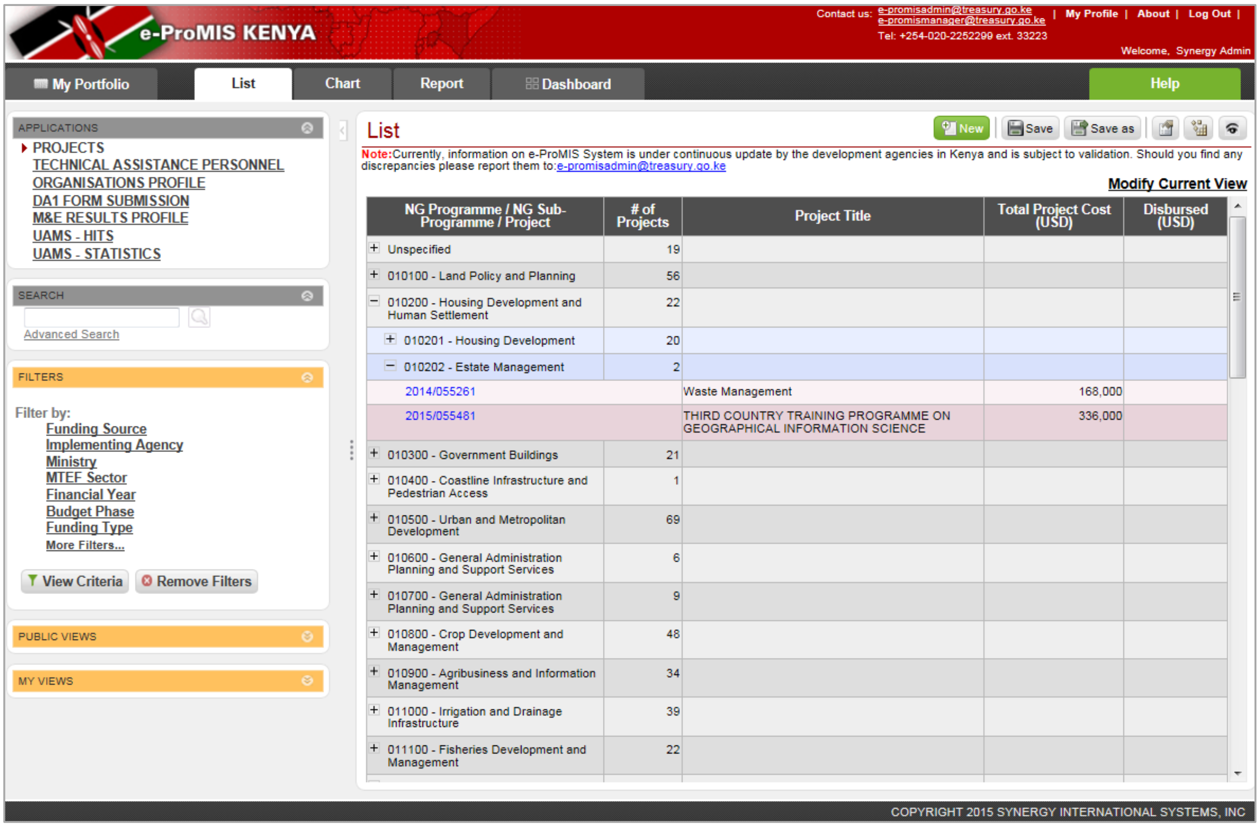


Figure 21: Sample View 1

7.7.2 Sample View 2

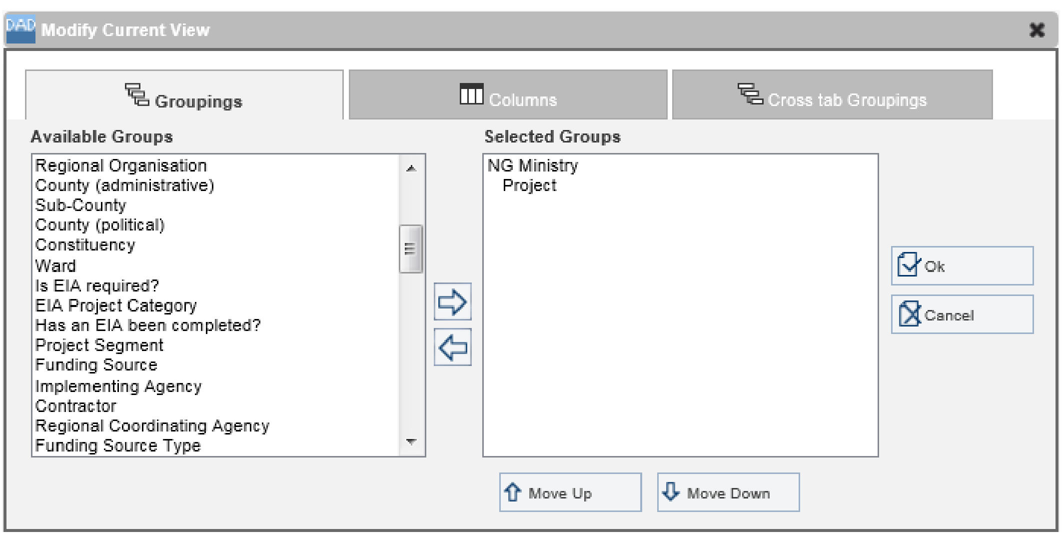


Figure 22: Defining List View Groupings for Sample View 2

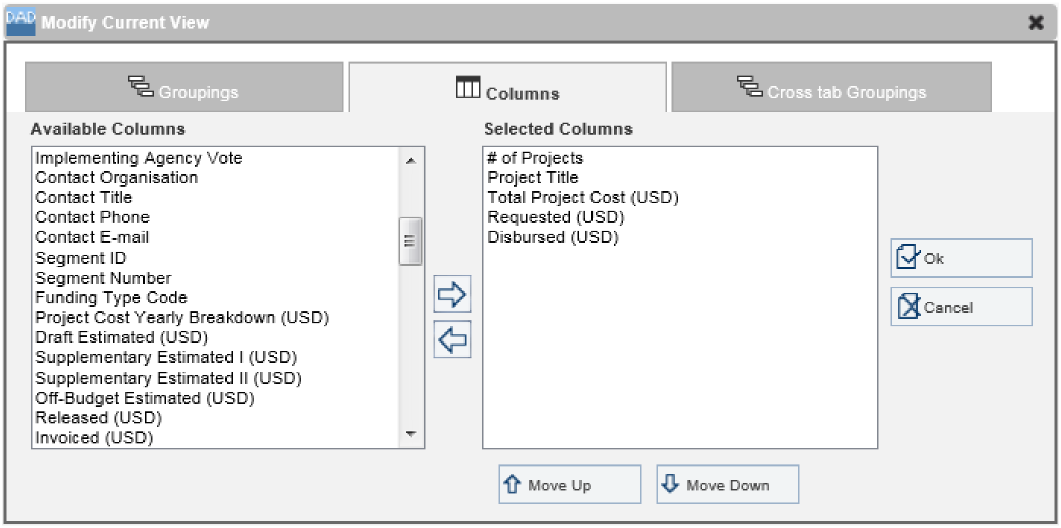


Figure 23: Defining List View Columns for Sample View 2

You will get the following result (Figure 24) if you have selected **NG Ministry / Project** hierarchy as a grouping (Figure 22) and **# of Projects / Project Title / Total Project Cost (USD) / Requested (USD) / Disbursed (USD)** as columns (Figure 23).

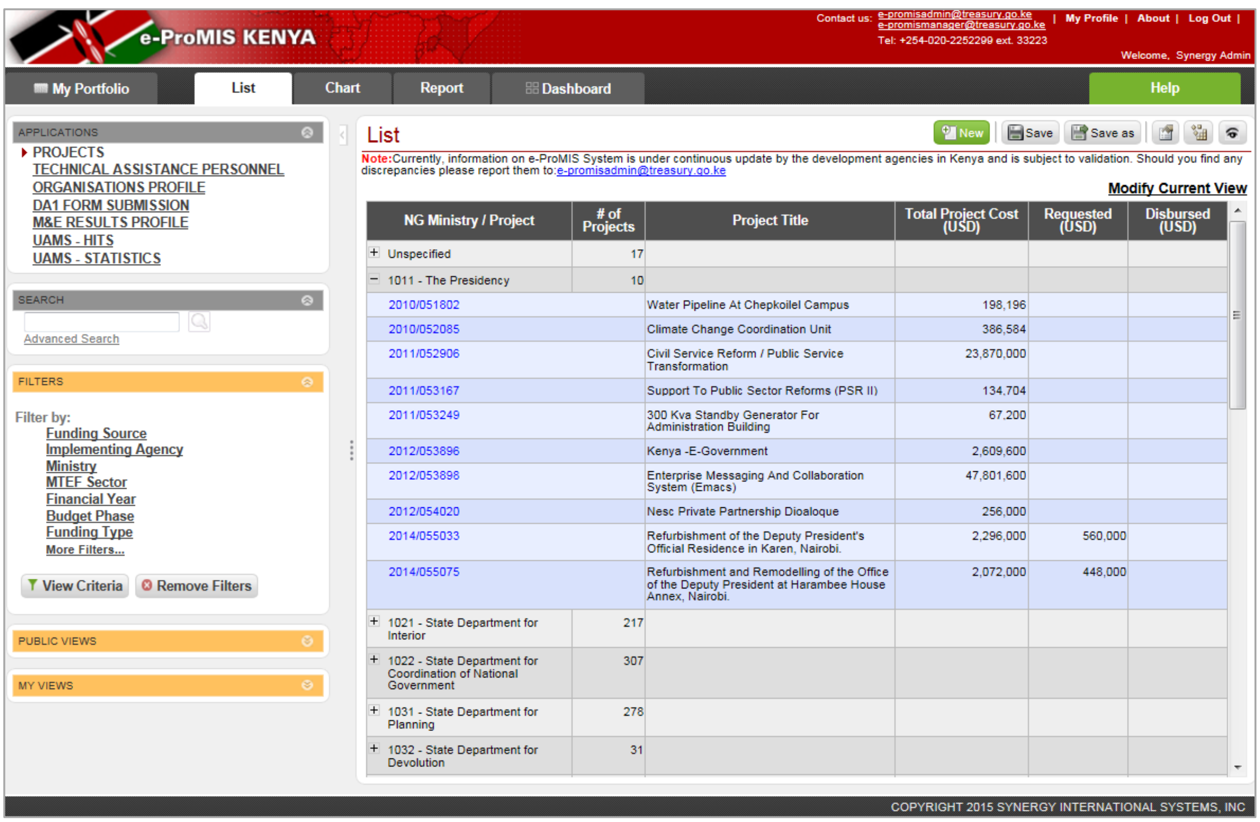


Figure 24: Sample View 2

8. CHART MODULE

The *e-ProMIS Kenya* application is equipped with a powerful chart designer that empowers you with all necessary tools to create charts for professionally looking presentations and reports. A user-friendly interface, great number of visual effects and pre-defined chart types, flexible chart components selection, and on-screen real-time chart visualization make using the chart designer an easy and delightful experience.

8.1 Key Features

You can make use of the following key features of the *Chart* tool in *e-ProMIS Kenya*:

- ✓ Rich user interface that supports movable windows for arranging the screen as desired.
- ✓ The ability to resize the charts directly in the workspace.
- ✓ The ability to show or hide the data labels and legends.
- ✓ The ability to customize the coloring, or choose pattern-filled charts for black and white printing.

8.2 Accessing the Chart Module

As it has been stated above, the system provides for the opportunity to present data in the form of different charts. In order to access the *Chart* module of the system, click the **Chart** tab. The *Chart* module appears where a pre-defined chart is displayed.

8.3 Main Screen and Its Components

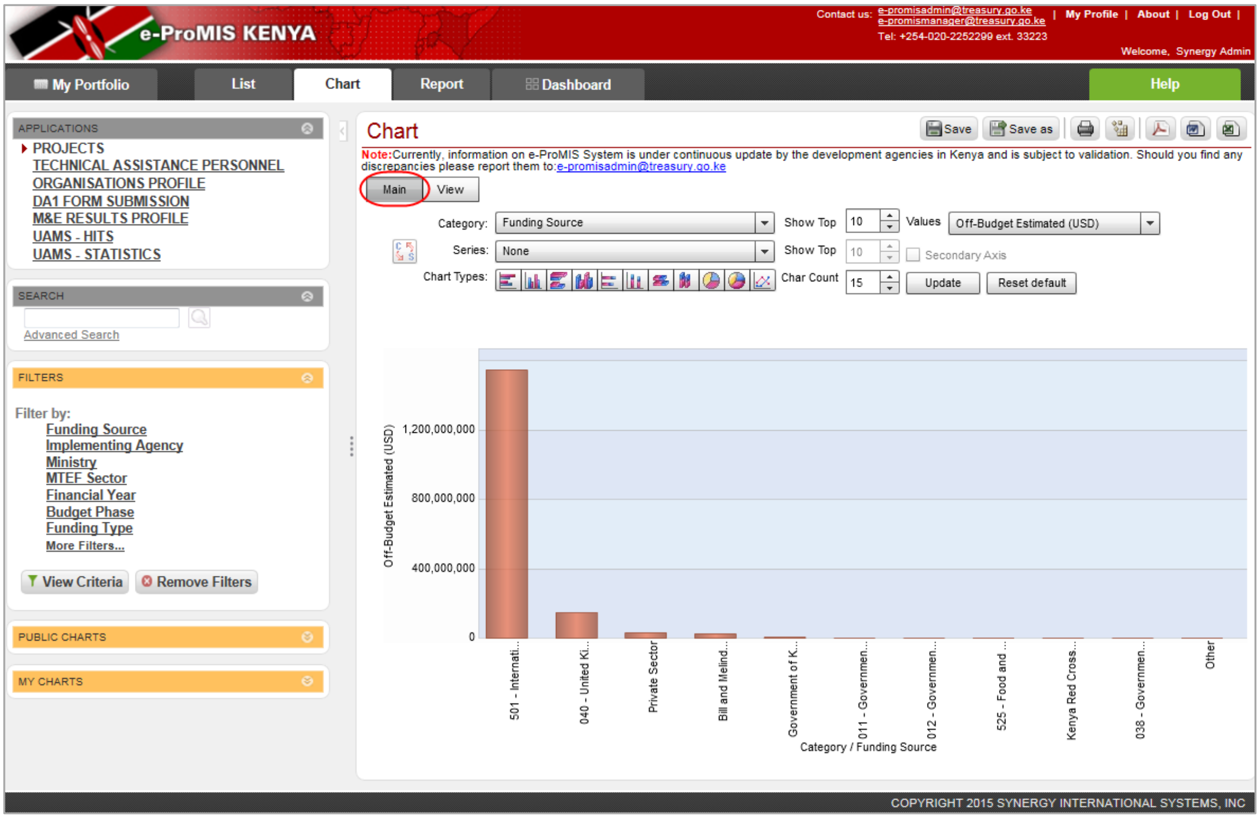


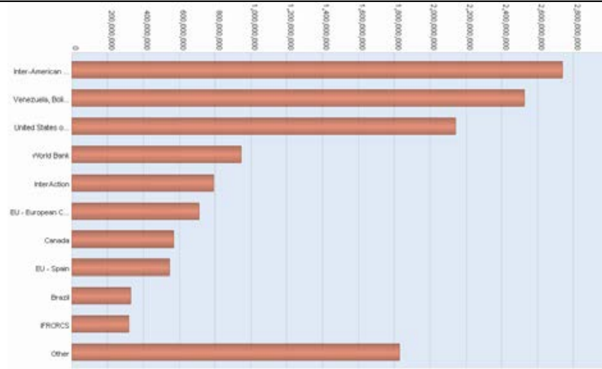
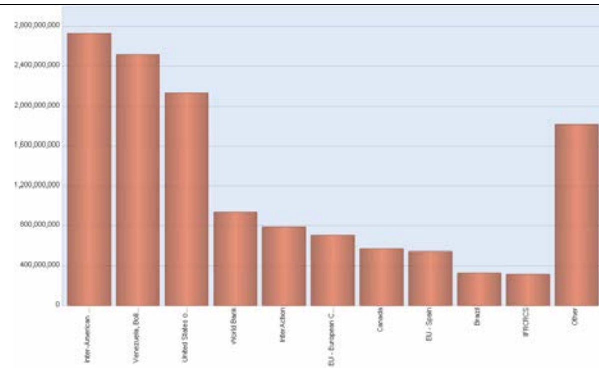
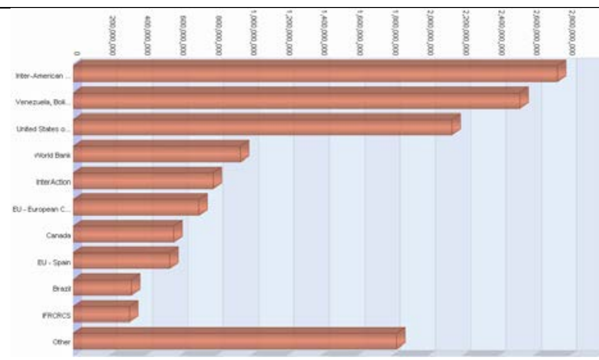
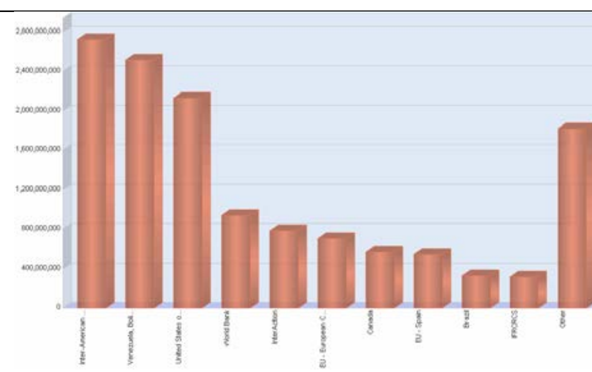
Figure 25: Main Screen of the Chart Module

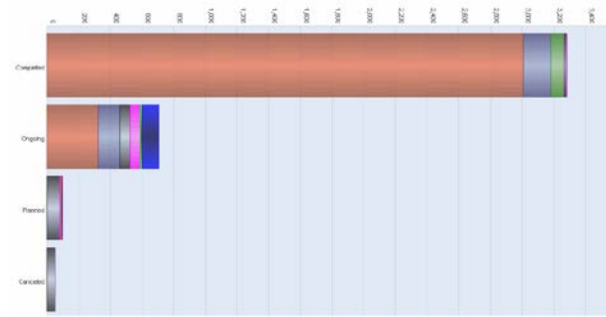
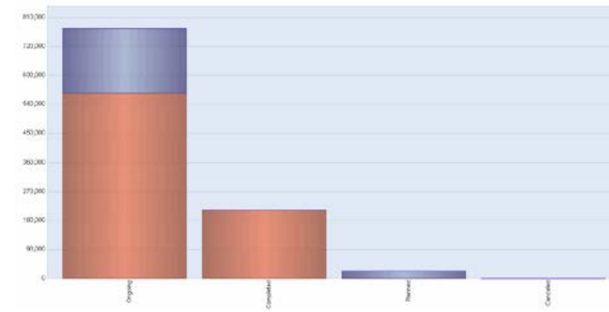
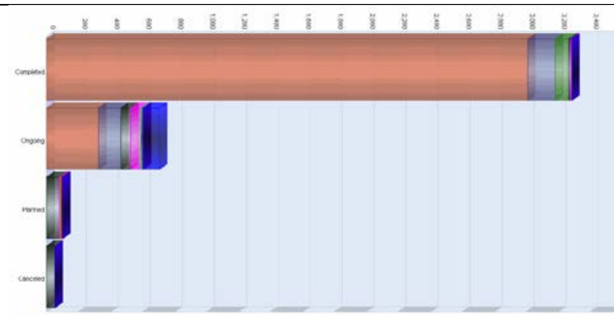
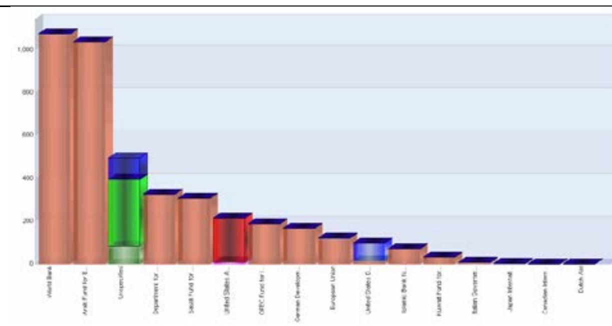
1. **Category** - allows selecting one of the options provided in the **Category** drop-down menu located at the top of the *Chart* window. The selected category will define one of the chart axes. Selection of a category for the chart report is required.

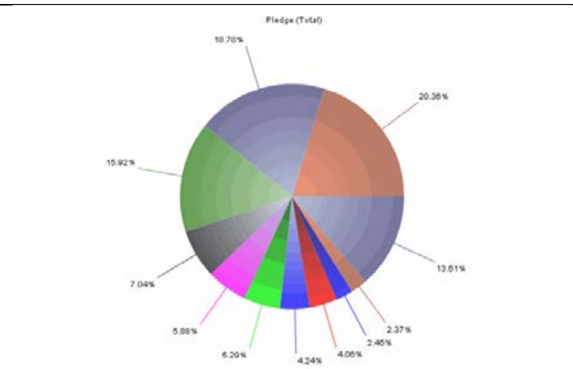
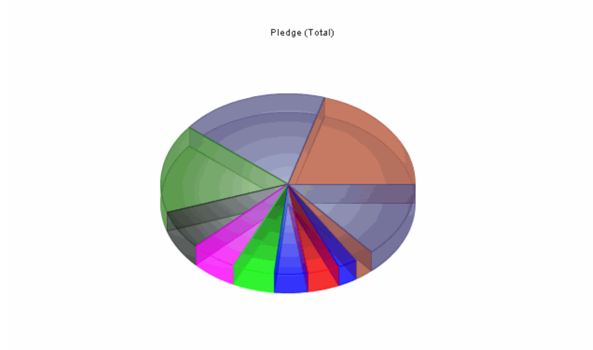
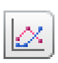
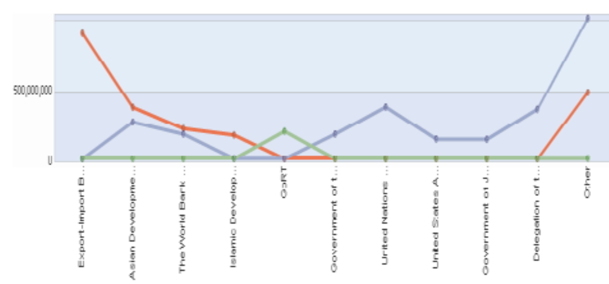
2. **Series** - allows selecting one of the options provided in the **Series** drop-down menu located at the top of the *Chart* window. The selected series will define the chart legend. Selection of a series for the chart report is optional.

   Note: Clicking the  **(Swap)** button allows switching places of category and series selections.

3. **Chart Types** - allows defining the chart type. The following options are available:

Chart Type	Example
1. Bar 	
2. Column 	
3. 3D Bar 	
4. 3D Column 	

5. Stacked Bar	
6. Stacked Column	
7. Stacked 3D Bar	
8. Stacked 3D Column	

9. Pie 	
10. 3D Pie 	
11. Line 	

4. **Show Top <Number>** - indicates the maximal number of category items to be displayed in the chart.

5. **Show Top <Number> on Secondary Axis** - indicates the maximal number of series items that should be displayed on the secondary axis in the chart. Becomes available only if a Series is selected. This option is disabled if you have selected the pie or line chart types.

6. **Char Count** - limits the number of characters to be used to display the category item names to the value set in this field.

7. **Values** - allows selecting a value from the list that will define the main chart criteria.

8. **Update** - loads the latest data from the database and displays them on the chart.

9. **Reset default** – loads the default chart built according to the default chart category and chart type.

10. **Workspace** - the main working area in the *Chart* module where the chart designed is displayed.

8.4 View Screen and Its Components

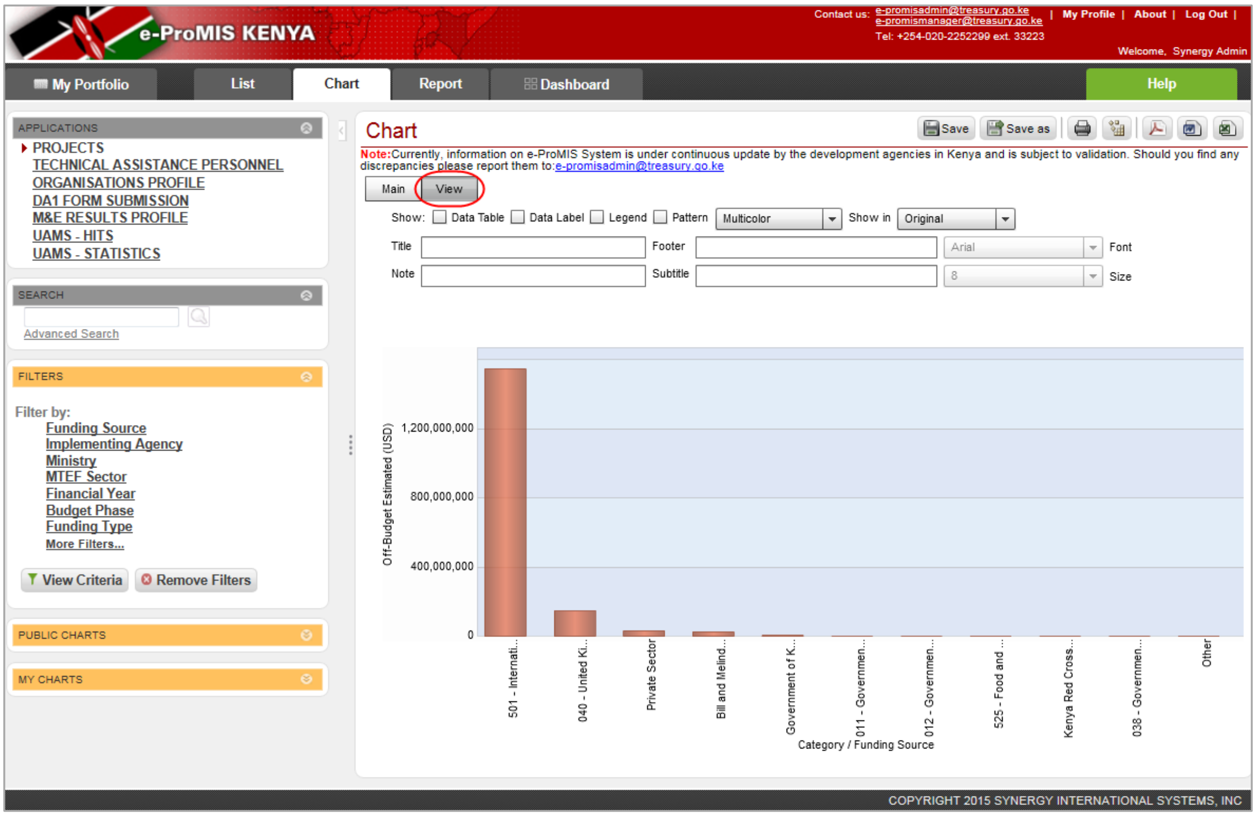


Figure 26: View Screen of the Chart Module

1. **Show -** allows selecting one or several of the following options:
   - ***Data Table -*** presents the information contained in the chart in a grid or matrix.
   - ***Data Label -*** shows the actual values of each chart cell. This option is disabled if you have selected the pie or line chart types.
   - ***Legend -*** explains the categories and data series displayed on the chart.
   - ***Pattern -*** allows choosing a pattern-filled chart for black and white printing.
   - ***Coloring Option -*** allows defining whether the chart should be displayed in multiple colors or in one of the colors available.
   - ***Show In –*** allows defining how the numeric values will be displayed on the chart. To avoid large number occupying too much space, you can choose to view the numbers in thousands / millions / billions.

2. **Title** – a text box to enter the chart report title.

3. **Note -** a text box to enter additional information about the chart report.

4. **Footer -** a text box to insert a portion of text that will appear in the bottom area of the chart report.

5. **Subtitle -** a text box to enter a subtitle for the chart report.

6. **Font -** allows selecting the font the chart report title/subtitle/footer/note will appear in.

7. **Size -** allows selecting the font size the chart report title/subtitle/footer/note will appear in.

8. **Workspace -** the main working area in the *Chart* module where the chart designed is displayed.

8.5 Sample Chart Reports

In the following chapters, you can see several samples on charts.

8.5.1 Sample Chart Report 1

If you have selected **Calendar Year/Month** as a chart Category, **Requested (USD)** / **Disbursed (USD)** / **Released (USD)** / **Invoiced (USD)** / **Paid (USD)** as Values to be shown on the chart, clicked the **3D Column** chart button to specify the chart type, and activated the **Legend** option in the *View* window, the following chart report will appear (Figure 27):

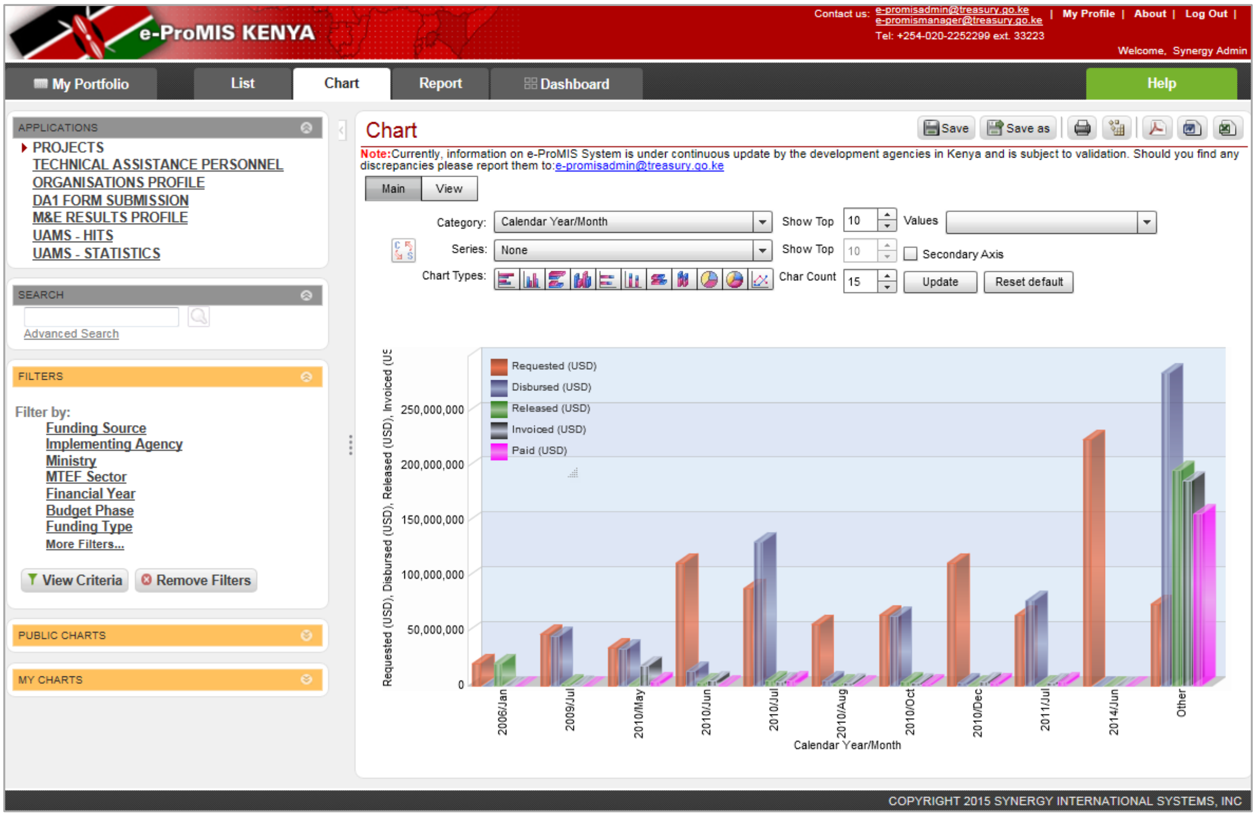


Figure 27: Sample Chart Report 1

8.5.2 Sample Chart Report 2

If you have selected **Funding Source** as a chart Category, **Requested (USD)** / **Disbursed (USD)** / **Released (USD)** / **Invoiced (USD)** / **Paid (USD)** as Values to be shown on the chart, clicked the **3D Pie** chart button to specify the chart type, and activated the **Data Table** and **Legend** options in the *View* window, the following chart report will appear (Figure 28):

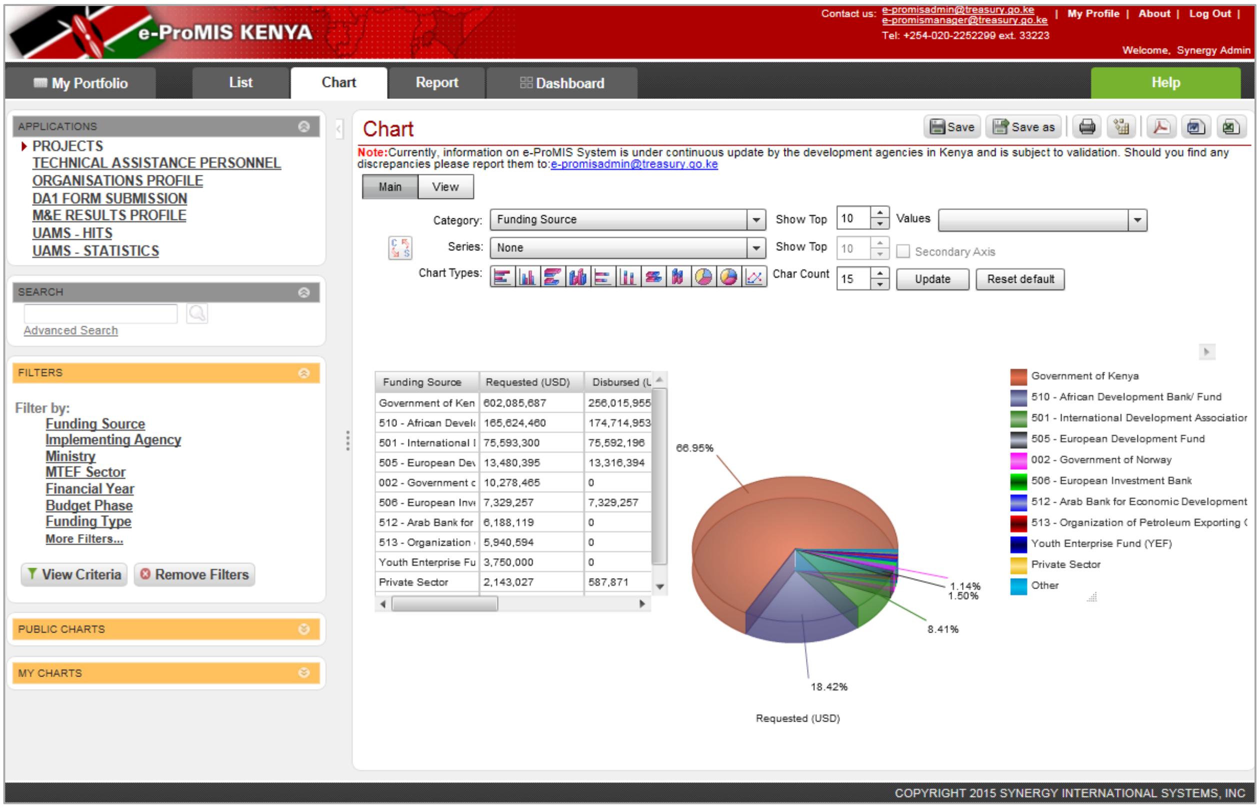


Figure 28: Sample Chart Report 2

9. REPORT MODULE

In the *Report* module of *e-ProMIS Kenya*, you can create and execute ad-hoc queries on the data, and acquire results in the form of different reports.

9.1 Accessing the Report Module

As it has been stated above, the system provides for the opportunity to create different sorts of list reports. In order to access the *Report* module of the system, click the **Report** tab. You will be navigated to the *Report* module of the application where the *Report Designer* (Figure 29) will open.

In this module, you can create list reports, save them as pre-defined reports, arrange them in the desired way, print them, etc.

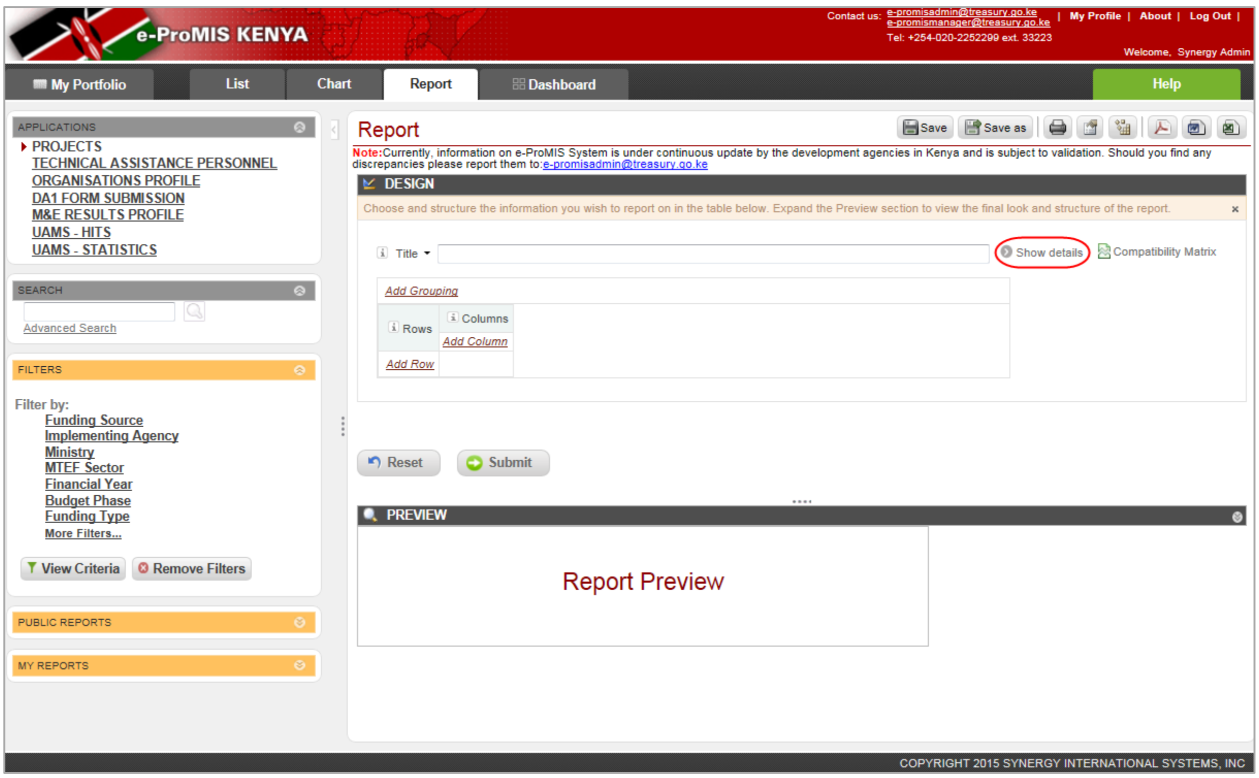


Figure 29: Report Module

9.2 Creating a Report

In order to create a report, i.e. to structure the report table and choose what information should appear in the rows and columns of the table, add report components, which are:

- **Text entries** – title, subtitle, header, and footer. For these fields, the expected input is a free text.

Note: By default, the *Report Designer* gives you the possibility of adding report titles. However, you can change the default view to make adjustments for other text entry components (sub-title, header, and footer) as well. To be able to provide additional textual information to the report, you will have to click the **Show Details** link (Figure 29) and provide the appropriate information in the fields that emerge. Clicking the **Hide Details** link will collapse the text entry fields displaying only the **Title**.

- **Report grouping** - allows grouping data according to a specific category. Grouped data appear in different tables. Each table contains data that fall under one group of the category specified.
- **Rows** - group data within the report table.
- **Columns** - show details specific to each table row.
- **Sub-columns** - divide the row details displayed under each column.

In order to add report components, follow the steps below: They provide instructions on how to compose and submit queries.

1. Type the text that should appear as the report title in the **Title** text box.
2. Enter a **Subtitle**, **Header**, and **Footer** if needed.
3. In the *Group Report by* section, specify the category, which will be used to group data into different tables. To add a report grouping, click the **Add Grouping** link in the *Group Report by* section and select the appropriate category from the menu that appears (Figure 30).
   Note: The report will be divided into as many tables as there are table groupings selected.
4. Select table rows by clicking the **Add Row** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one row at a time from the list of available rows.
5. Select table columns by clicking the **Add Column** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one column at a time from the list of available columns.

Note: Once you have selected a report column, an **Add Sub-column** link becomes available under the selected column. It allows indicating how the row details displayed under each column will be divided.

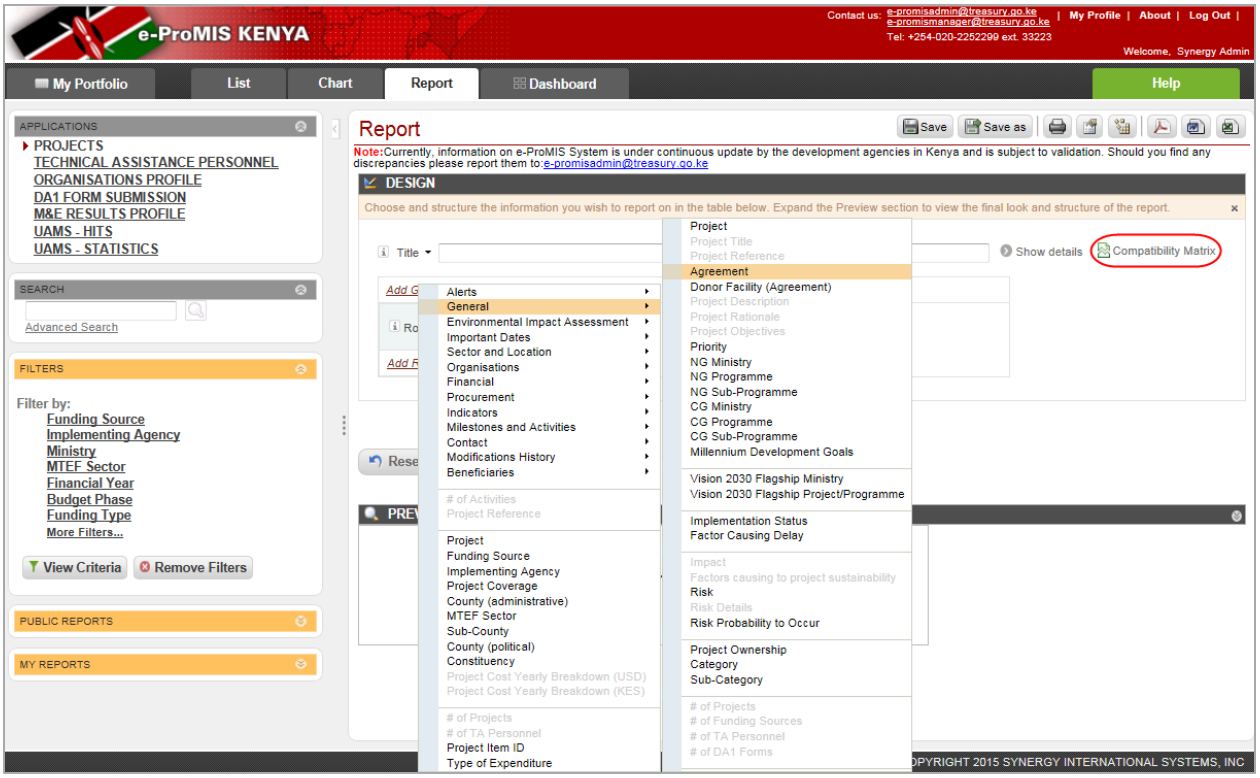


Figure 30: Selecting a Grouping for a Report

Note: At any point it is possible to remove all components selected for the report and design a new report from scratch by clicking the Reset button.

Note: If you have defined a report which has incompatible columns (columns over which reports cannot be generated), they will be marked in red and an error message will occur. To make your reports productive, you can use the link (as marked in red, Figure 30) to open the Compatibility Matrix table (Figure 31). This is a table that displays the compatibility between all categories and measures in the database to display them in the report.

Compatibility Matrix

• - indicates compatibility between Category and Measure

Rows(Categories) / Columns(Measures)	(History) New Value	(History) Original Value	# of Activities	# of Beneficiaries	# of Contracts	# of DA1 Forms	# of Funding Sources	# of Projects	# of TA Personnel	Activity Cost (Actual) (KES)	Activity Cost (Actual) (USD)
(History) Field Changed By	•	•	•	•	•		•	•	•	•	•
(History) Field Changed On	•	•	•	•	•		•	•	•	•	•
(History) Field Changed Year	•	•	•	•	•		•	•	•	•	•
(History) Field Changed Year/Month	•	•	•	•	•		•	•	•	•	•
(History) Field Name	•	•	•	•	•		•	•	•	•	•
Activity				•	•		•	•	•	•	•
Activity Responsible Organisation			•	•	•		•	•	•	•	•
Agreement			•	•	•		•	•	•	•	•
Alert - Absorption Rate			•	•	•		•	•	•	•	•
Alert - Cost Overruns			•	•	•		•	•	•	•	•
Alert - Project Delays			•	•	•		•	•	•	•	•
Beneficiary Category			•	•	•		•	•	•	•	•
Beneficiary Type			•	•	•		•	•	•	•	•
Budget Phase			•	•	•		•	•	•	•	•
Calendar Year			•	•	•		•	•	•	•	•
Calendar Year/Month			•	•	•		•	•	•	•	•
Category			•	•	•		•	•	•	•	•
CG Ministry			•	•	•		•	•	•	•	•
CG Programme			•	•	•		•	•	•	•	•
[illegible]gramme				•				•	•		•

Figure 31: Compatibility Matrix

9.3 Previewing a Report

At any time during the process of creating a report, look in the *Preview* section at the bottom of the page, in order to view the final structure of the report (Figure 32). The *Preview* will not be ready for viewing unless the user has at least one table row defined.

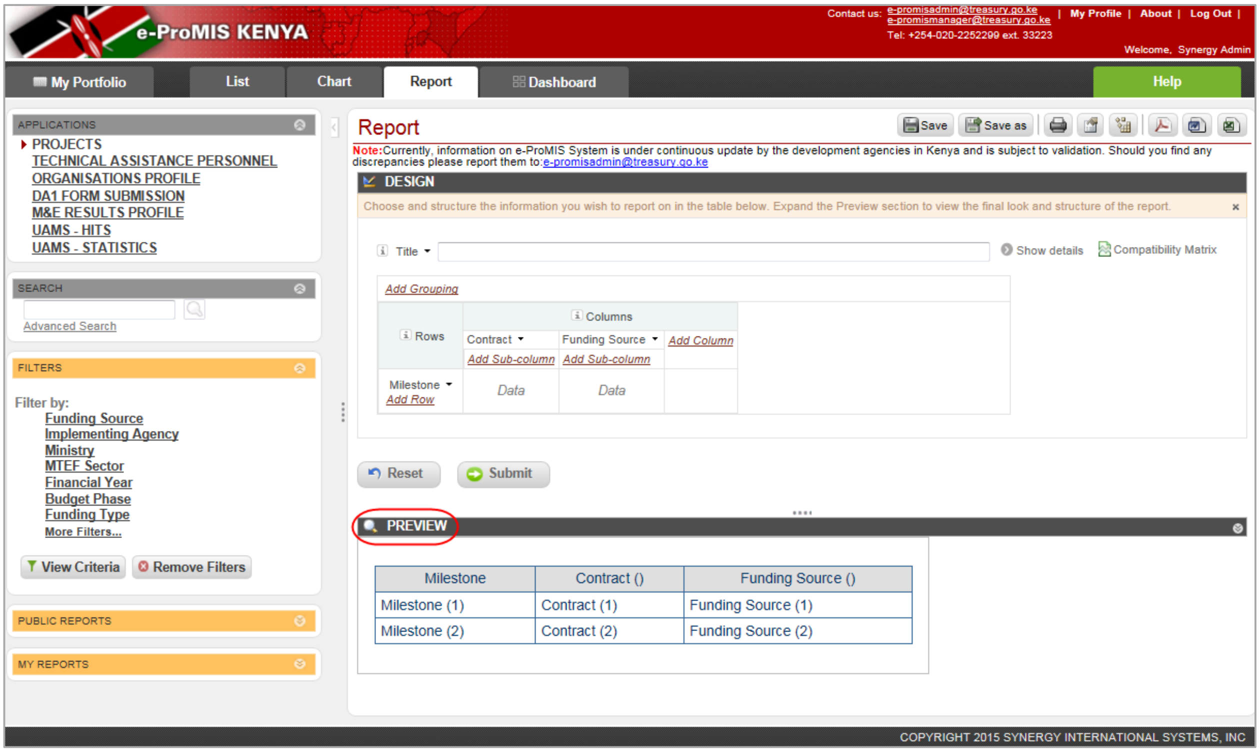


Figure 32: Previewing the Report

All your added report components and structuring results will be displayed in the *Preview* section which helps you to check whether the report matches the required output or not. This section can be expanded in order to display whole of the information.

9.4 Generating a Report

The final step in the process of creating a report is report generation. By clicking the

button, a request to the Reporting Engine is submitted in order to access the database, gather the required data and present it in the manner required. The report containing all the real data appears in a new window.

9.5 Sample Reports

In the following chapters, you can see several samples on reports.

9.5.1 Sample Report 1

If you have indicated (Figure 33):

- **Budget Phase** as a report grouping;
- **MTEF Sector** / **Project** hierarchy as the report rows;
- **Project Title**, **Implementation Status**, **Total Project Cost (USD)**, and **Total Project Cost (KES)** as columns;
- Applied some formatting (e.g. background colour, font size, etc.).

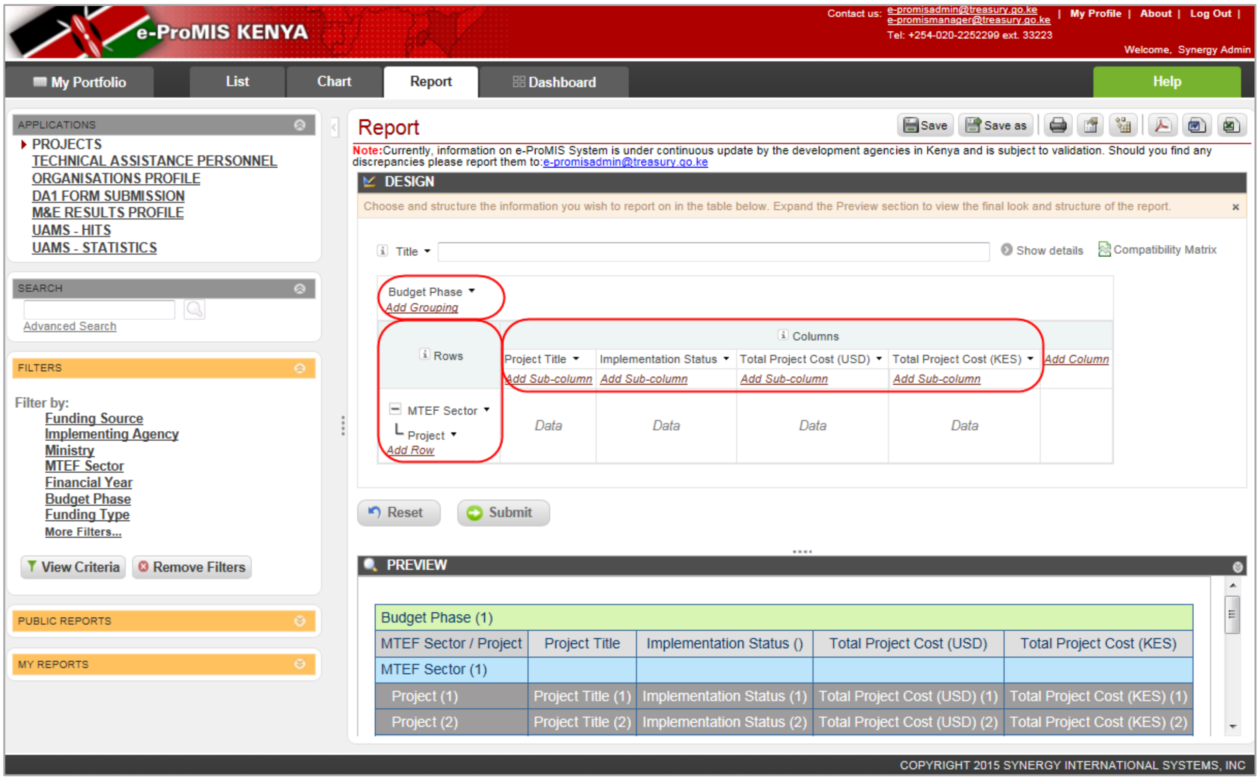
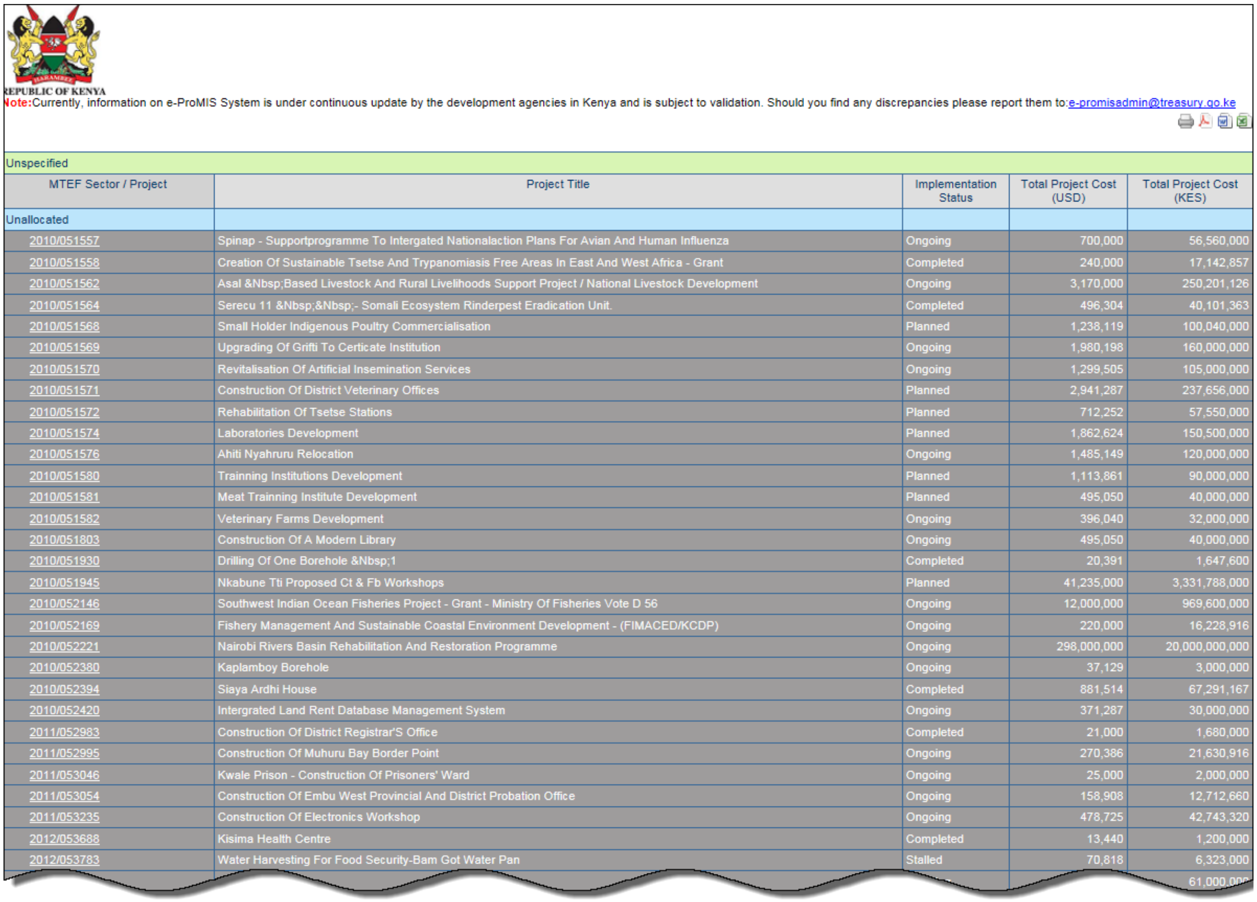


Figure 33: Creating Report 1

You will have the following result (Figure 34):



REPUBLIC OF KENYA

Note:Currently, information on e-ProMIS System is under continuous update by the development agencies in Kenya and is subject to validation. Should you find any discrepancies please report them to:e-promisadmin@treasury.go.ke

Unspecified

MTEF Sector / Project	Project Title	Implementation Status	Total Project Cost (USD)	Total Project Cost (KES)
Unallocated				
2010/051557	Spinap - Supportprogramme To Intergated Nationalaction Plans For Avian And Human Influenza	Ongoing	700,000	56,560,000
2010/051558	Creation Of Sustainable Tsetse And Trypanomiasis Free Areas In East And West Africa - Grant	Completed	240,000	17,142,857
2010/051562	Asal Based Livestock And Rural Livelihoods Support Project / National Livestock Development	Ongoing	3,170,000	250,201,126
2010/051564	Serecu 11 - Somali Ecosystem Rinderpest Eradication Unit.	Completed	496,304	40,101,363
2010/051568	Small Holder Indigenous Poultry Commercialisation	Planned	1,238,119	100,040,000
2010/051569	Upgrading Of Grifti To Certicate Institution	Ongoing	1,980,198	160,000,000
2010/051570	Revitalisation Of Artificial Insemination Services	Ongoing	1,299,505	105,000,000
2010/051571	Construction Of District Veterinary Offices	Planned	2,941,287	237,656,000
2010/051572	Rehabilitation Of Tsetse Stations	Planned	712,252	57,550,000
2010/051574	Laboratories Development	Planned	1,862,624	150,500,000
2010/051576	Ahiti Nyahruru Relocation	Ongoing	1,485,149	120,000,000
2010/051580	Trainning Institutions Development	Planned	1,113,861	90,000,000
2010/051581	Meat Trainning Institute Development	Planned	495,050	40,000,000
2010/051582	Veterinary Farms Development	Ongoing	396,040	32,000,000
2010/051803	Construction Of A Modern Library	Ongoing	495,050	40,000,000
2010/051930	Drilling Of One Borehole 1	Completed	20,391	1,647,600
2010/051945	Nkabune Tti Proposed Ct & Fb Workshops	Planned	41,235,000	3,331,788,000
2010/052146	Southwest Indian Ocean Fisheries Project - Grant - Ministry Of Fisheries Vote D 56	Ongoing	12,000,000	969,600,000
2010/052169	Fishery Management And Sustainable Coastal Environment Development - (FIMACED/KCDP)	Ongoing	220,000	16,228,916
2010/052221	Nairobi Rivers Basin Rehabilitation And Restoration Programme	Ongoing	298,000,000	20,000,000,000
2010/052380	Kaplamboy Borehole	Ongoing	37,129	3,000,000
2010/052394	Siaya Ardhi House	Completed	881,514	67,291,167
2010/052420	Intergrated Land Rent Database Management System	Ongoing	371,287	30,000,000
2011/052983	Construction Of District Registrar'S Office	Completed	21,000	1,680,000
2011/052995	Construction Of Muhuru Bay Border Point	Ongoing	270,386	21,630,916
2011/053046	Kwale Prison - Construction Of Prisoners' Ward	Ongoing	25,000	2,000,000
2011/053054	Construction Of Embu West Provincial And District Probation Office	Ongoing	158,908	12,712,660
2011/053235	Construction Of Electronics Workshop	Ongoing	478,725	42,743,320
2012/053688	Kisima Health Centre	Completed	13,440	1,200,000
2012/053783	Water Harvesting For Food Security-Bam Got Water Pan	Stalled	70,818	6,323,000
				61,000,000

Figure 34: Sample List Report 1

9.5.2 Sample Report 2

If you have indicated (Figure 35):

- **Ministry of Finance** as the report title;
- **External Resources Department** as the report subtitle;
- **Number of Projects by Various Sources of Funds** as the report header;
- **Funding Source / Implementing Agency** hierarchy as the report rows;
- **# of Projects** as a column;
- Applied some formatting (e.g. background colour, font size, etc.).

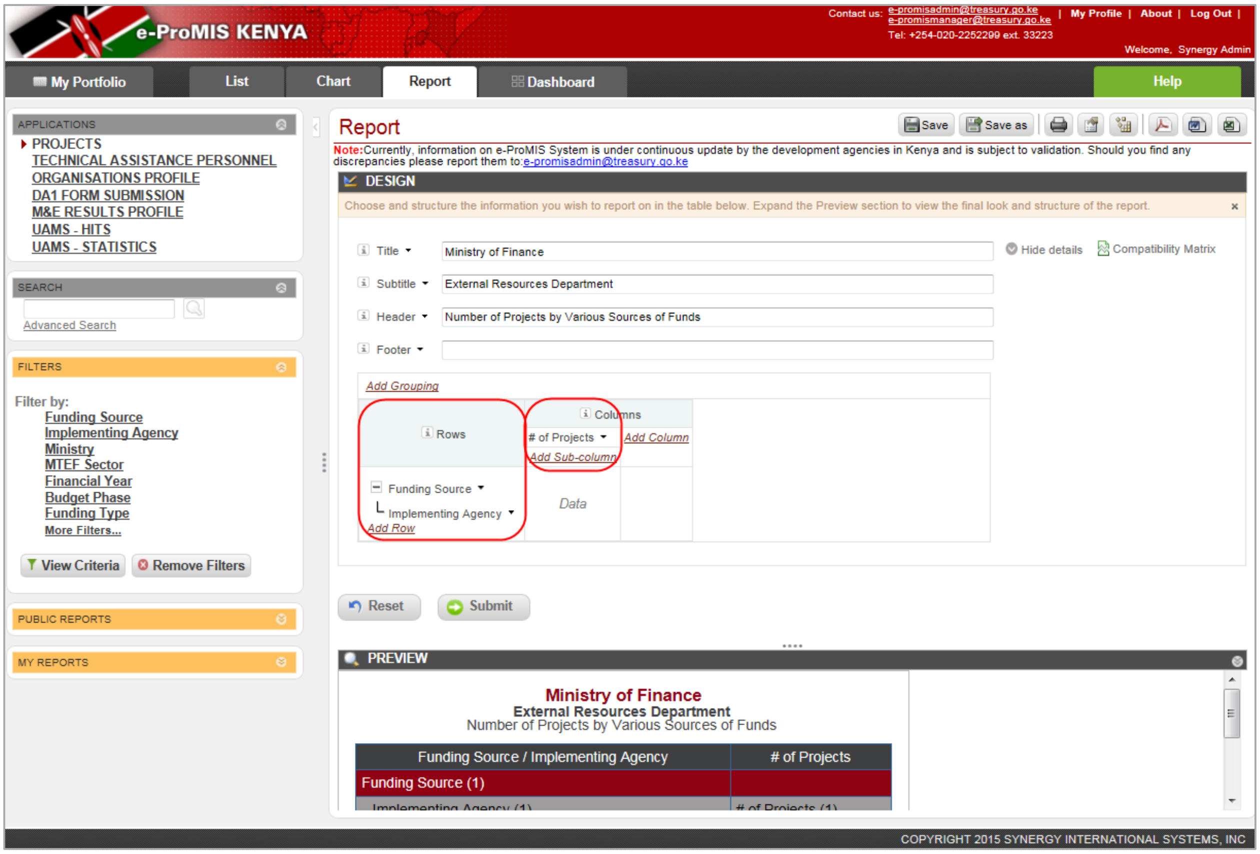


Figure 35: Creating Report 2

You will have the following result (Figure 36):

REPUBLIC OF KENYA

Note: Currently, information on e-ProMIS System is under continuous update by the development agencies in Kenya and is subject to validation. Should you find any discrepancies please report them to: e-promisadmin@treasury.go.ke

Ministry of Finance

External Resources Department

Number of Projects by Various Sources of Funds

Funding Source / Implementing Agency	# of Projects
Unspecified	
106 - Ministry of Education	1
1081 - Ministry of Health	4
110 - Ministry of Environment Water and Natural Resources	12
111 - NACC - National Aids Control Council	2
1111 - Ministry of Land Housing and Urban Development	1
116 - Ministry of Agriculture, Livestock and Fisheries	2
166 - MOWI - National Irrigation Board	8
172 - MOWI - Water Resources Management Authority	2
MoHEST - Coast Institute of Technology	1
MoHEST - Gusii Institute of Technology	1
001 - Government of Denmark	
1011 - The Presidency	2
102 - Ministry of Interior and Coordination of National Government	1
103 - Ministry of Devolution and Planning	4
1031 - State Department for Planning	2
1032 - State Department for Devolution	1
1071 - The National Treasury	2
1081 - Ministry of Health	2
110 - Ministry of Environment Water and Natural Resources	4
110 - MOEW&NR - National Environment Management Authority (NEMA)	2
1101 - State Department for Environment and Natural Resources	2
1102 - State Department for Water and Regional Authorities.	1
1141 - Ministry of Labour Social Security and Services	1
116 - Ministry of Agriculture, Livestock and Fisheries	1
1171 - Ministry of Industrialization and Enterprise Development	3
118 - Ministry of Commerce Tourism and East African Affairs	1
149 - MOTR - Export Promotion Council	2

Figure 36: Sample List Report 2

9.6 Customizing Reports

You can customize the reports by assigning font characteristics to report components, re-ordering rows and columns, etc. The sections below will describe how to customize the reports.

9.6.1 Formatting / Styling Report Components

You may format/style the text entries as well as main report table captions and values by assigning to them value characteristics such as font, font size, font color, background color, alignment (i.e. left, center, or right), etc.

In order to format/style a report component, follow the steps below:

1. Click the report component that needs to be formatted / styled.
2. Select the **Properties** option from the actions list that appears (Figure 37).

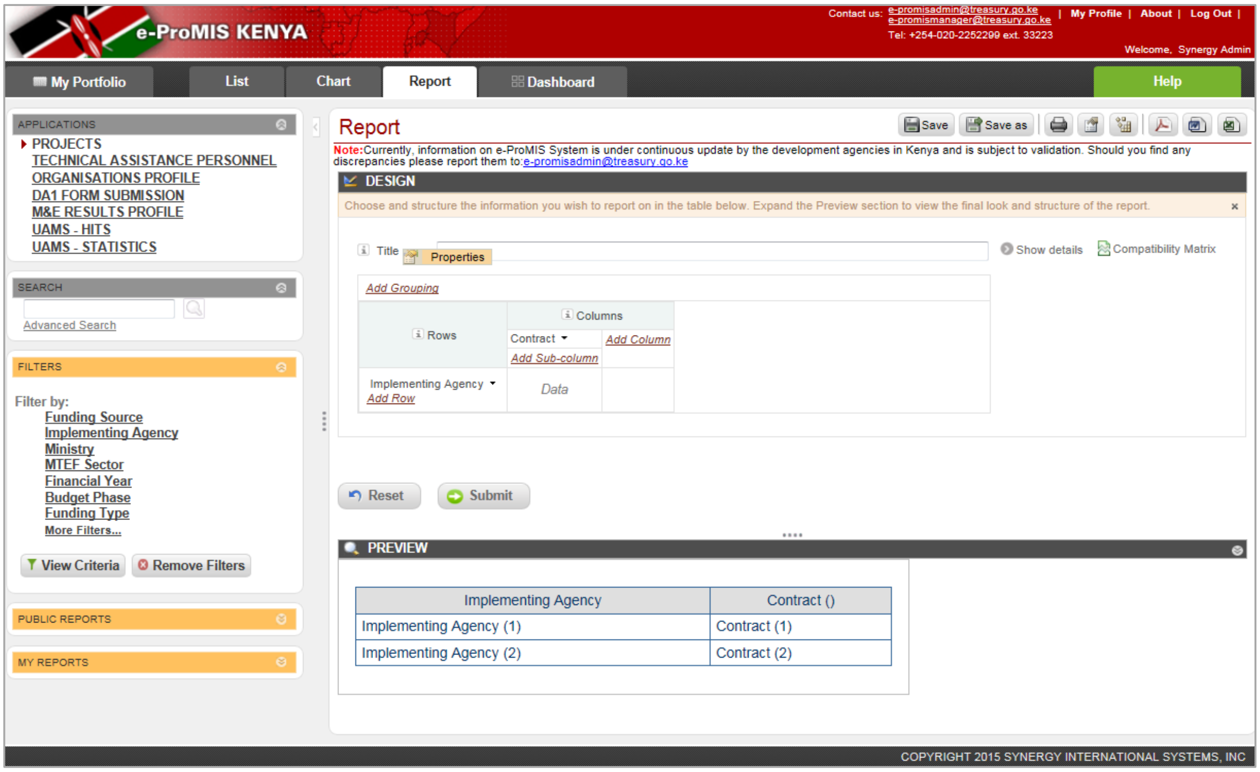


Figure 37: Reports Window with Properties Focus on the Title Field

The *Properties* window will appear. Please note that for text entries the *Properties* window includes text formatting buttons and a text area (Figure 38). For other report components, like rows, columns, etc., the *Properties* window also allows assigning additional characteristics, e.g. sorting order, reference text, etc. (Figure 40).

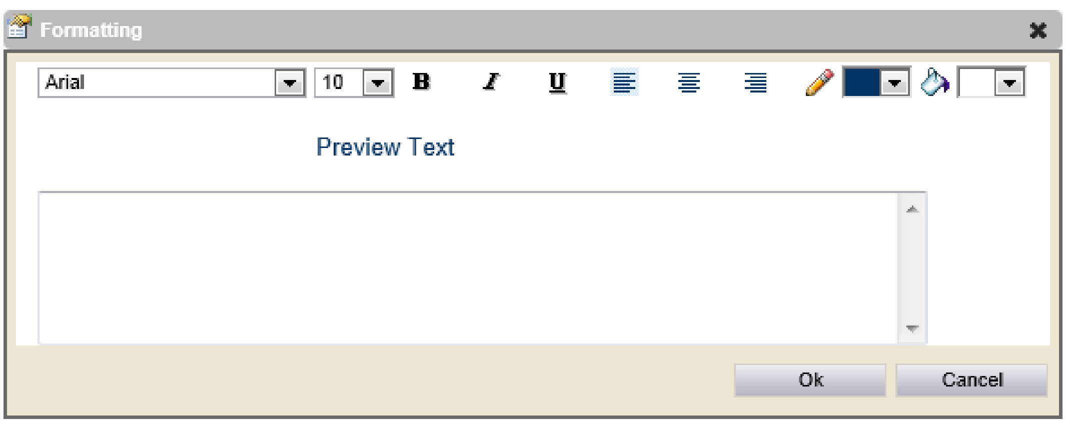


Figure 38: Formatting / Styling Text Entries

3. Change the properties as needed.
   Note: To prevent you navigating away from the section every time when modifying the properties of a different report table component, the *Properties* window allows selecting the next item to be modified. To do that, you need to select the appropriate instance from the *Items* drop-down list in the *Properties* window. The list contains the previously selected report table components.

4. Click the **Apply** button for the changes to take effect. Clicking the **Ok** button will close the window and navigate you to the *Report* module.

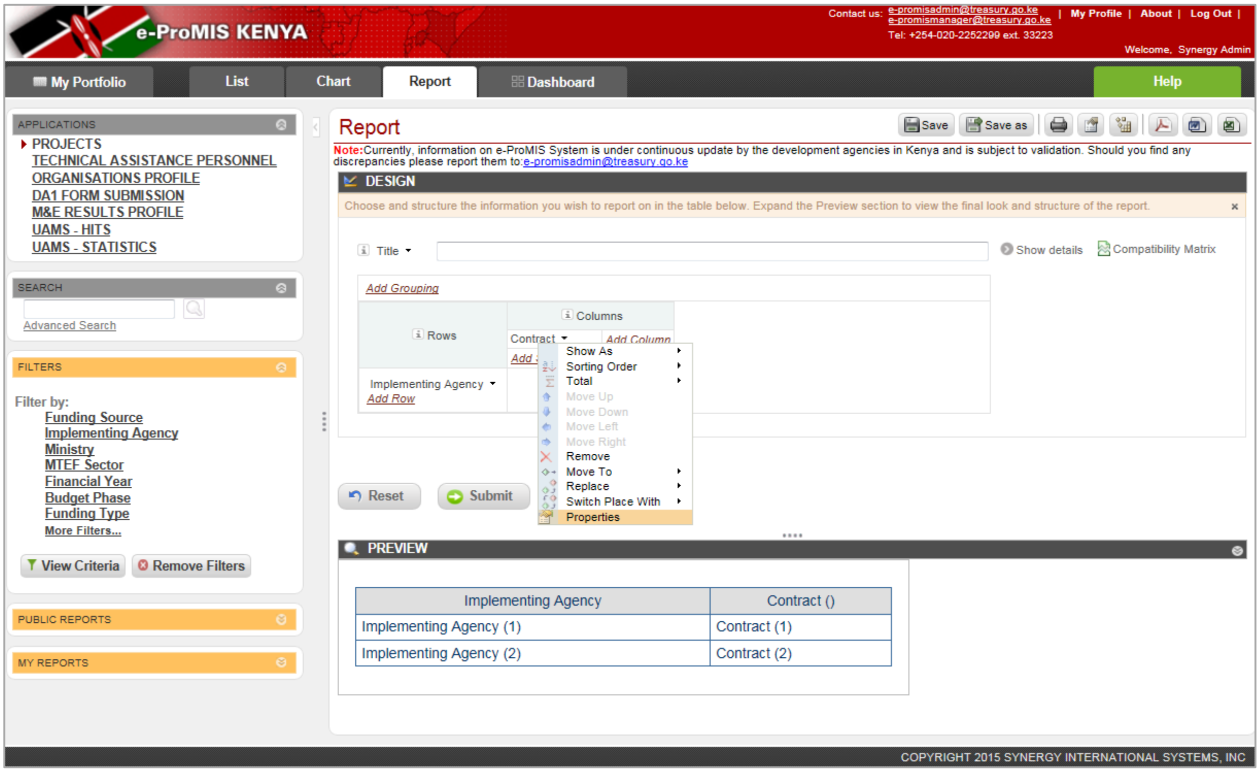


Figure 39: Reports Window with Properties Focus on the Column

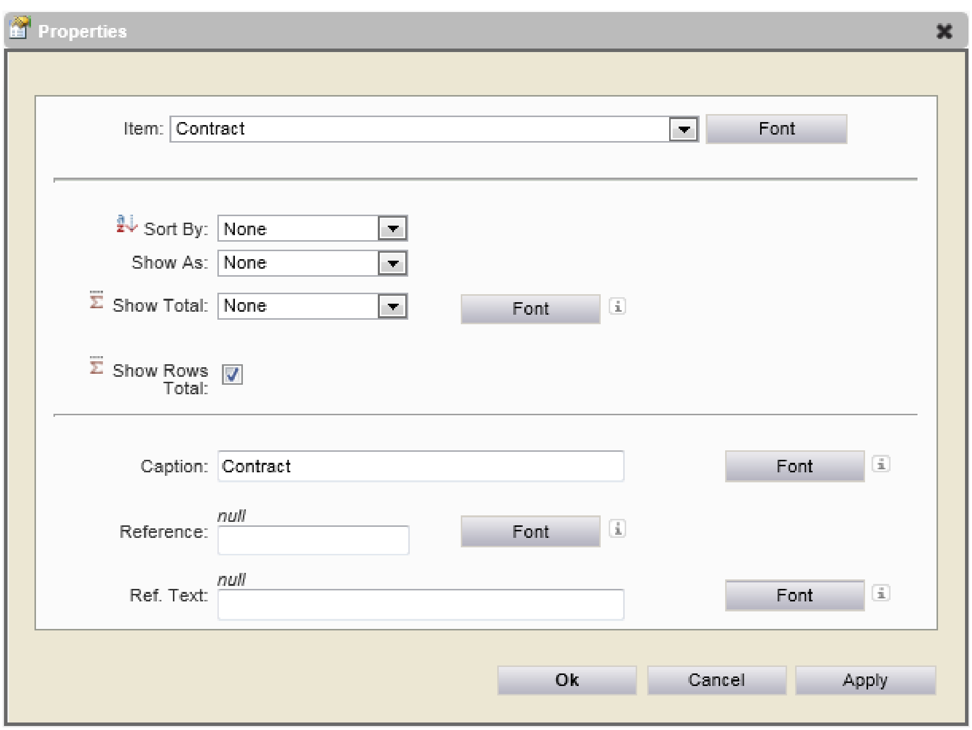


Figure 40: Assigning Properties to Report Table Components

9.6.2 Re-ordering Report Table Components

This option enables the user to establish and modify the order of the report table components, like rows, columns, etc.

In order to re-order report table components, follow the steps below:

1. Click the component item that needs to be reordered in the report.
2. Select the respective **Move Up** / **Move Down** / **Move Right** / **Move Left** option from the menu that appears. The report generated will maintain the order of the items that was displayed in the *Report Designer* (Figure 41).

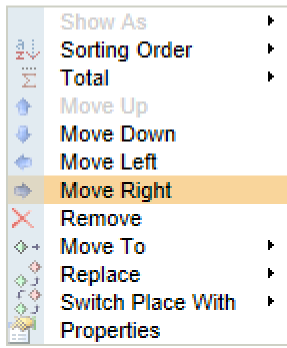


Figure 41: Reordering Report Table Components

Note: If any of these actions is not available, the respective option will be disabled in the menu.

9.6.3 Sorting Report Table Components

You may change the order in which the table components will appear in the final report. The report table components can be sorted either in an *Ascending (A-Z)* or a *Descending (Z-A)* order.

In order to alphabetically sort the report table components, follow the steps below:

1. Click the component item for which the sorting order needs to be changed.
2. Select the **Sorting Order** option from the actions list (Figure 42).
3. Define whether the report item values should be sorted in the ascending or descending order. Please note that selecting the **None** option from the list removes the sorting criteria.

Note: The sorting order for the report components can also be defined from within the *Properties* window.

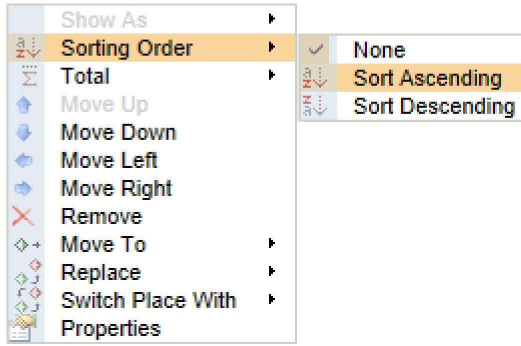


Figure 42: Defining the Sorting Order

9.6.4 Removing a Report Table Component

It is possible to remove a report table component from being included in the report, if this is necessary.

In order to remove a report table component, follow the steps below:

1. Click the component item that needs to be removed.
2. Select the **Remove** option from the menu that appears. The selected grouping value will be removed.

9.6.5 Switching Report Table Components

The report table components may be switched between report grouping, rows and columns. If there are sub-columns selected, switching between table groupings / rows and columns is disabled. It is possible to switch between table groupings / rows and sub-columns.

In order to switch report table components, follow the steps below:

1. Click the component item that needs to be switched.
2. Select the **Switch Place with** option from the menu that appears (Figure 43).

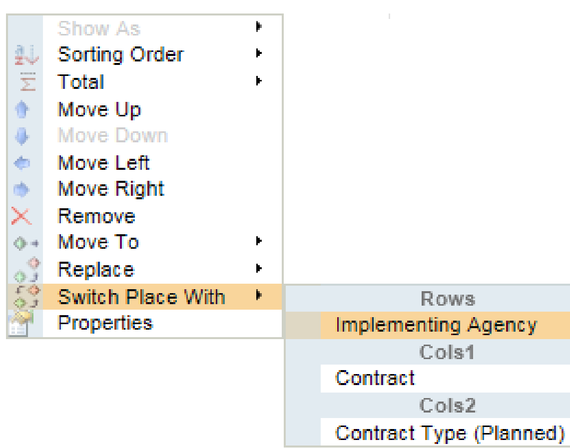


Figure 43: Switching Report Table Components

3. Define what component item the selected instance needs to switch place with. The selected component item will be removed from its current position and added as an

item to the specified component. For instance, if it is selected to switch between table grouping and row, the selected table grouping item will be removed from table grouping and added as the row item, while the row item will 'trade' places with the table grouping item.

10. DASHBOARD MODULE

Reporting requirements have changed dramatically over the past few years. Nowadays, it is not enough to be able to produce a report to analyze data, but it is more essential to have a reporting tool that will allow for a visual display of the most important information consolidated and arranged on a single screen so that real-time data can be monitored at a glance.

As a comprehensive reporting tool, *e-ProMIS Kenya* removes the limitations on report development giving the possibility to view various types of analytical data such as lists, charts, and reports displayed in a user-friendly environment on a dashboard. Unlike 'regular' reports, dashboards provide visual, at a glance insight into the data to be analyzed, thus giving the decision-makers the possibility to leverage information assets in real-time through visually rich, responsive and personalized business intelligence dashboards. This way, they will achieve better data interpretation and, as a result, more informed decision making.

10.1 Key Features

You can make use of the following key features of the *Dashboard* tool in *e-ProMIS Kenya*:

- ✓ An intuitive drag-and-drop environment that turns adding reports to a dashboard into an easily manageable task.
- ✓ Fully resizable report windows.
- ✓ Better visualization of the information presented in graph reports.
- ✓ The ability to print reports for future reference.
- ✓ The ability to export reports on the dashboard in MS Word, MS Excel, and Adobe PDF formats.

10.2 Accessing the Dashboard Module

In order to access the *Dashboard* module of the system, you should click the **Dashboard** tab. This will navigate you to the *Dashboard* module. In this module, you can create dashboards, include reports under them, etc.

10.3 Main Screen and Its Components

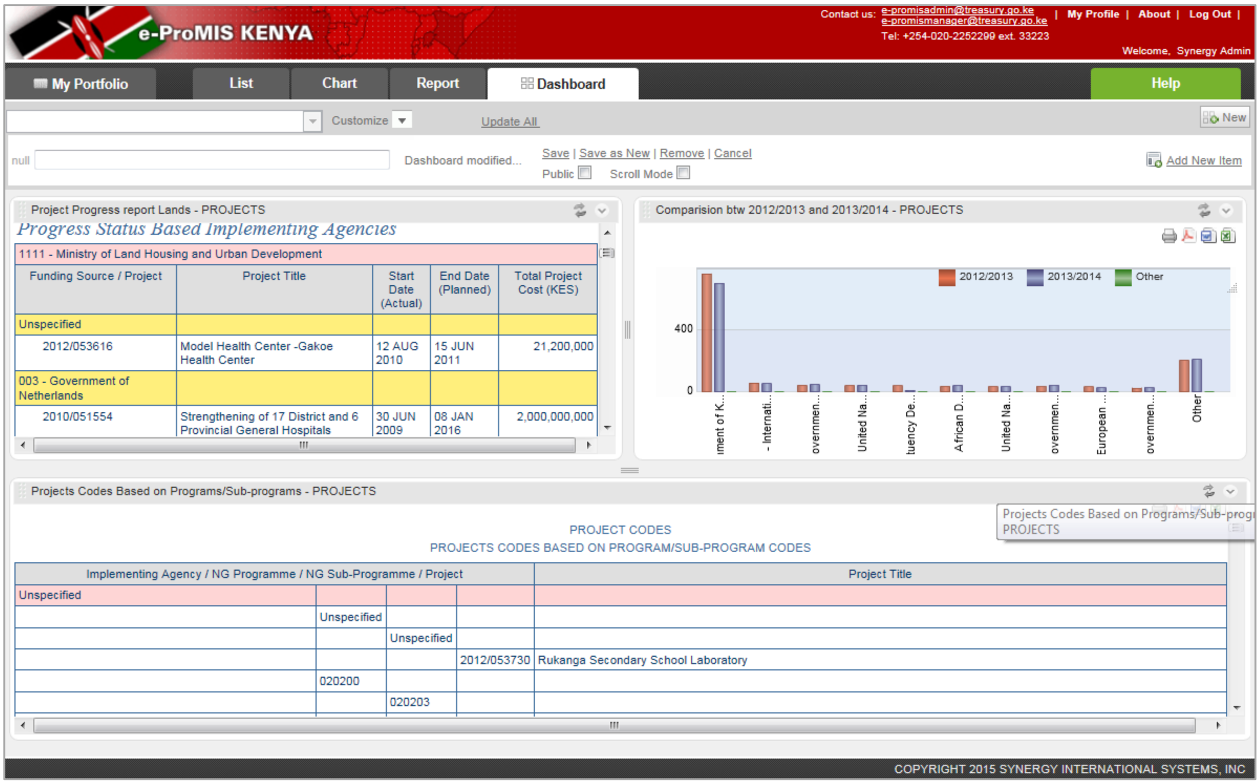


Figure 44: Dashboard Module

- **Dashboard Selector -** contains a list of pre-defined dashboards. By choosing a definite dashboard from this list, you can view the reports stored in the selected dashboard.

- **Customize -** allows performing the following operations:
  - o ***Name -*** displays the dashboard name.
  - o ***Save -*** saves a dashboard so that it can be shared with other users.
  - o ***Save as New -*** saves a dashboard as a new one. This option is especially useful if you need to make modifications in a definite dashboard while keeping the source information intact. This way overwriting of the original dashboard is prevented.
  - o ***Remove -*** deletes a dashboard together with its contents.
  - o ***Cancel -*** discards the modifications made to the dashboard currently displayed on the screen.
  - o ***Public –*** makes the dashboard available to other users as well if selected.
  - o ***Scroll Mode*** – toggles the scrollbar thus allowing additional space for adding reports to the dashboard.

- **Update all -** loads the latest data from the database.

- **New -** creates a new dashboard.

- **Add New Item -** adds a new report under the definite dashboard from the list of all pre-defined reports previously created.

- **Dashboard Workspace -** the main screen of the Dashboard module where the content of a definite dashboard is viewed.

10.4 Dashboard Management

10.4.1 Create a New Dashboard

In order to create a new dashboard, follow the steps below:

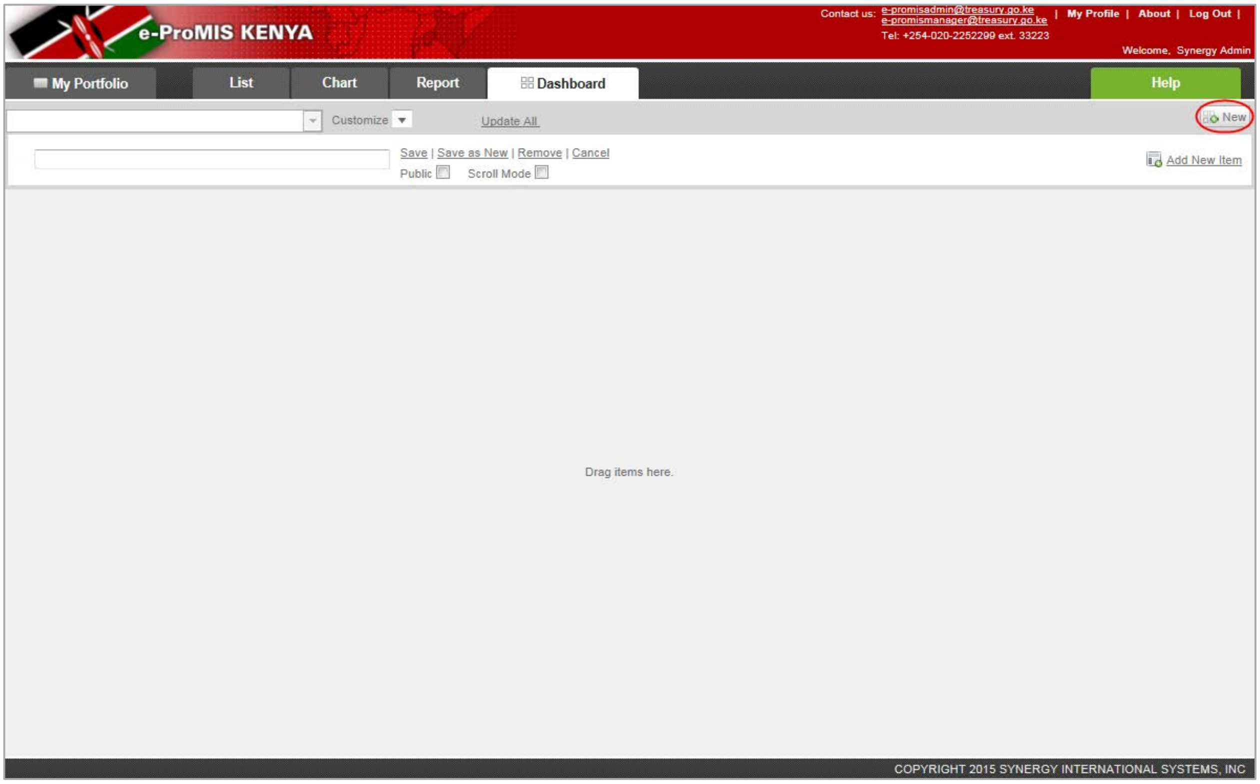


Figure 45: Adding a New Dashboard

1. Click the **New** button at the upper right corner of the screen. New field appears in the left part of the screen to give a name other than the default one to the dashboard and to save it. Also, the list of all existing pre-defined reports is used to add new items to the dashboard (Figure 45).
2. Give the desired name to the dashboard.
3. Add reports to the dashboard, see Add an Item to a Dashboard.
4. Save it.

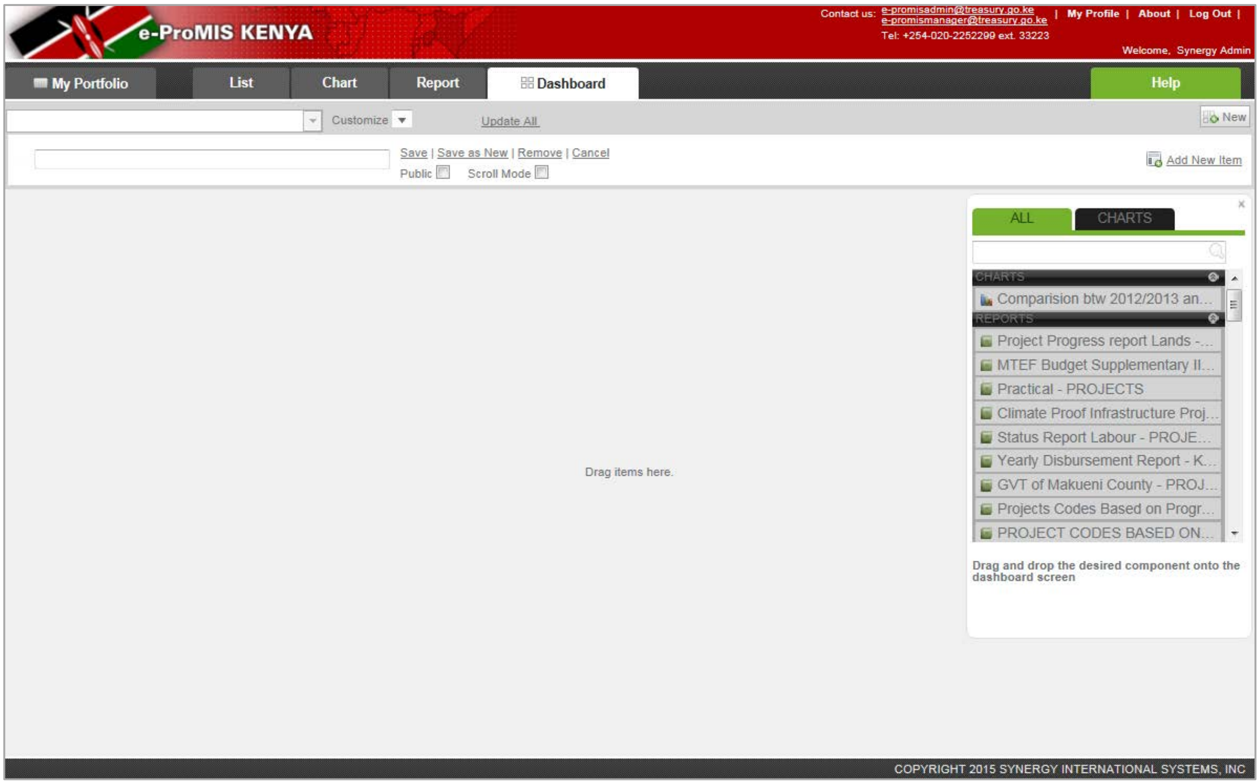


Figure 46: List of Pre-defined Reports

10.4.2 Add an Item to a Dashboard

In order to add a report to a dashboard, follow the steps described below:

1. Click the **Add New Item** link. The list of all reports previously saved reports will appear (Figure 46).
2. Select a report to add to a dashboard and drag-and-drop it onto the main screen.
3. If you want to add another report to the dashboard, select it in the list, drag it onto the main screen and hold the left mouse button until a green rectangle appears on the screen indicating an area where the new report can be placed. Keep the mouse button pressed until the green rectangle turns blue and release it (Figure 47). Please note that you may add multiple reports to the dashboard.

Note: The reports can be arranged either in vertical or in horizontal order. Once the place for the report is selected, it cannot be changed.

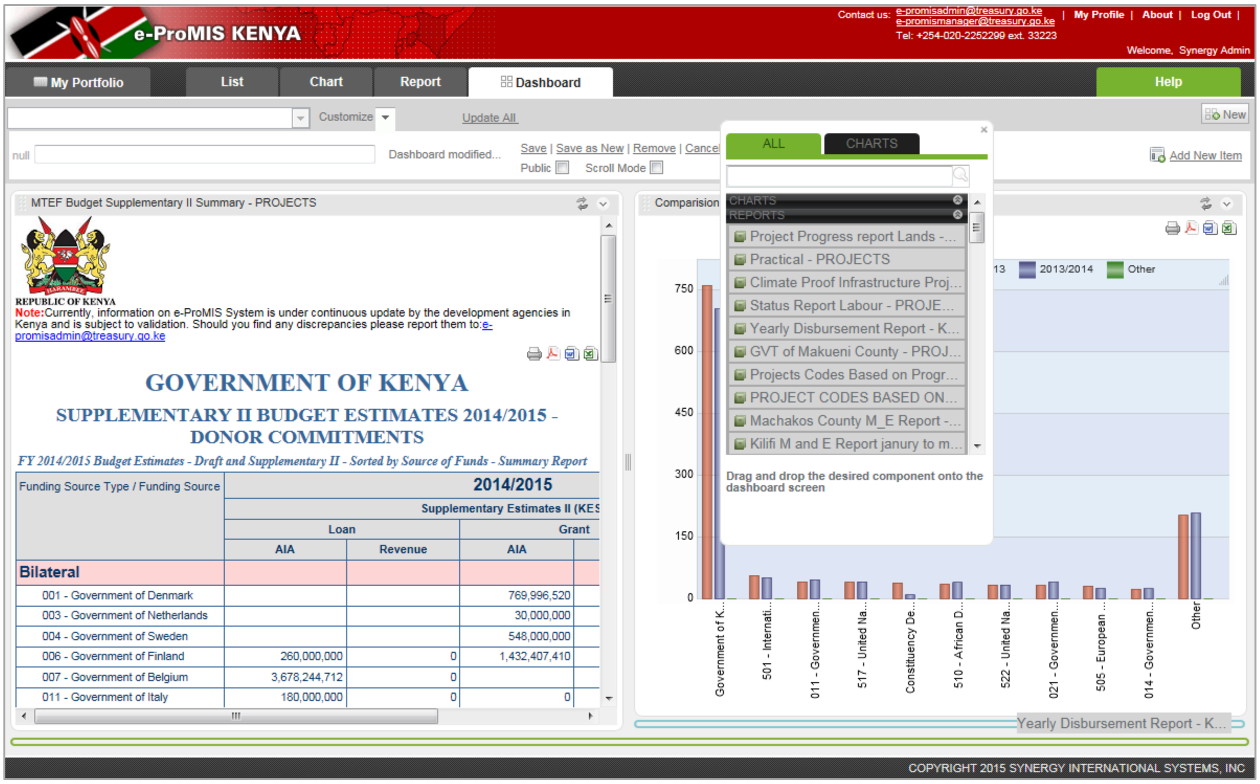


Figure 47: Adding a New Report

10.4.3 Customize a Dashboard

In the *Dashboard module*, you can customize any dashboard created, i.e. rename the dashboard, save the changes made to it, save a copy of the dashboard, delete a dashboard, and/or discard the changes made. For details, see below.

In order to customize a dashboard, follow the steps below:

1. Click the **Customize** button. A new section will appear displaying all customizable options in the *Dashboard* module (Figure 48).
2. Take the necessary action.
3. Save the changes.

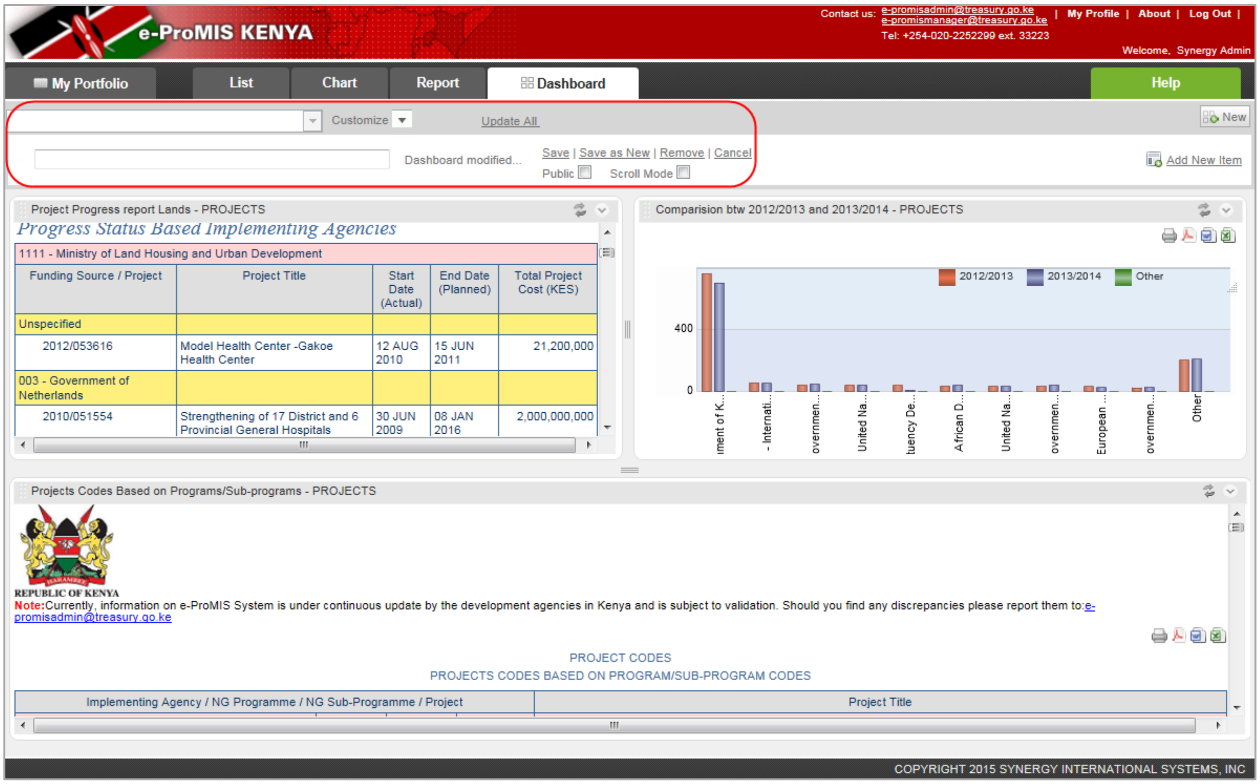


Figure 48: Customizing a Dashboard

10.4.4 Save a Dashboard

After the new dashboard has been created and items added to it, it is necessary to save it to be able to view it later on. It should be mentioned that there are two options for saving dashboards:

- **Save:** saves all modifications made to the dashboard.
- **Save as New**: saves a copy of a dashboard under a new name.

In order to save a dashboard / a copy of a dashboard, follow the steps below:

1. Select the respective **Save** or **Save as New** option.
2. Click **Ok** in the message window indicating the dashboard / the changes to it have been saved successfully.

10.4.5 Delete a Dashboard

In order to delete a dashboard, follow the steps below:

1. Select the dashboard that you want to delete. Its contents will be displayed on the main screen.
2. Click the **Remove** link. The selected dashboard will be deleted.

10.4.6 Discard the Changes

In order to discard the changes made to the dashboard currently displayed on the screen, follow the steps below:

1. Click the **Cancel** link.
2. Confirm that you want to discard all changes made to the dashboard by clicking **Ok** in the warning message window that appears.

10.4.7 Update Data

For decision makers, it is very important to have access to the latest data available. This is why the Dashboard module allows you to update all reports included in various dashboards. In order to load the latest data from the database, select the **Update All** option.

If you want to update the data in an individual report, click **Refresh** button in the top toolbar of the report screen. The latest data for the selected report will be loaded from the database.

11. DETAILS SECTION

The *e-ProMIS Kenya* application has a built-in *Details* section, where you can view detailed project information, e.g. project financial information, the sector(s) of economy it supports, the project location, etc.

The *Details* section can be accessed from the *My Portfolio, List, Chart,* and *Report* modules. In the *Details* section, you can view detailed project information, browse among other projects listed under the same parent item, print project details, etc.

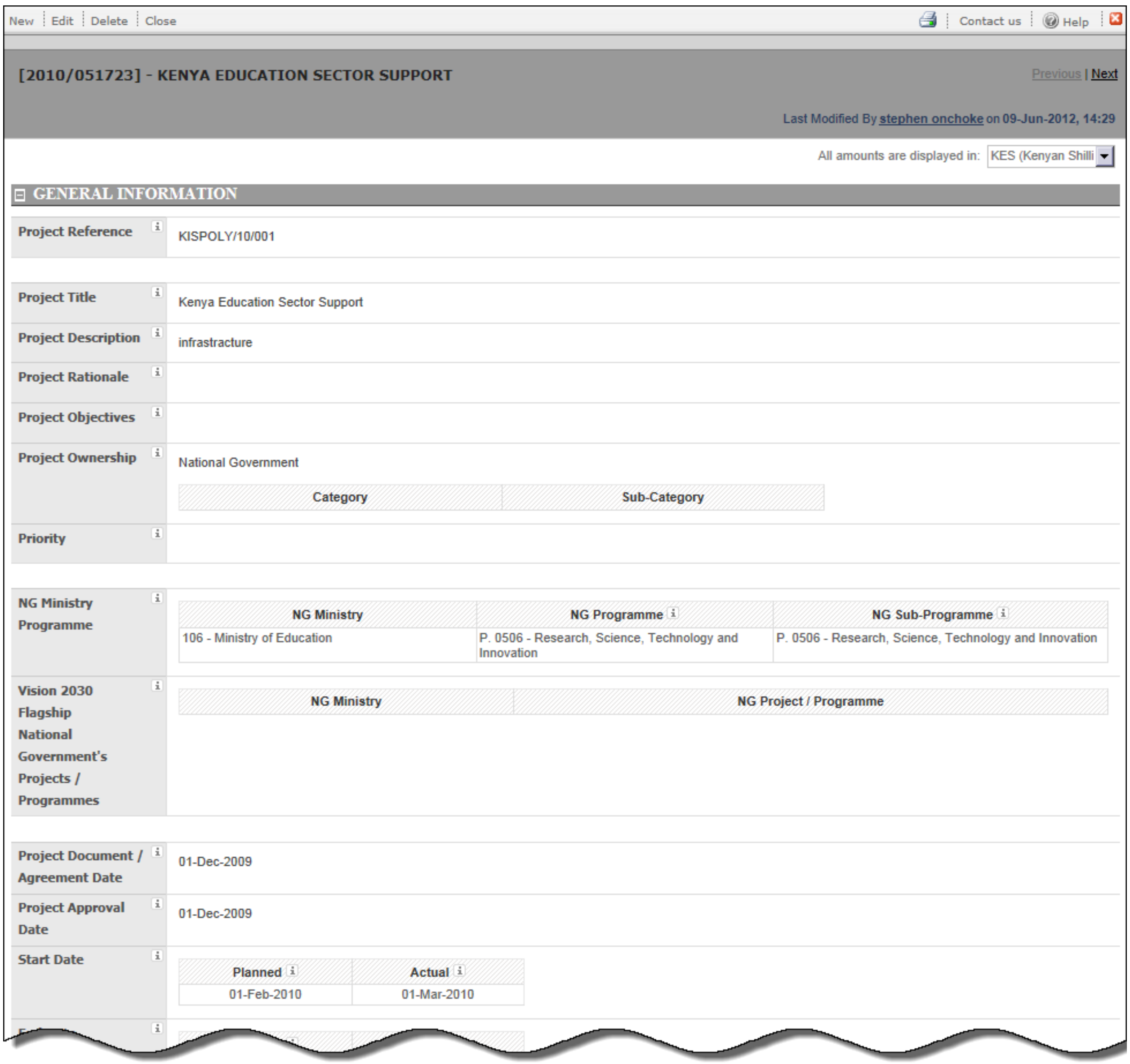


Figure 49: Details Section

11.1 Accessing the Details Section

In order to access the *Details* section, follow the steps below:

1. Access the *Details* section by clicking on the one of the following:
   - In the *My Portfolio* module: Click the respective project. You will be directed to the **Details** section (Figure 49).
   - In the *List module*: Click the project for the details to be displayed. This will open the *Details* section of the application where more detailed information about the project will be displayed.
     Note: Depending on the list representation settings, additional expanding the list items may be required to reach the project.
   - In the *Chart* module: Click the chart for the details to be displayed (e.g., click the relevant bar to see what it consists of). This will open the *Details* section of the application where all items matching the selection will be listed. Click the **Project** link for the details of the selected project to be displayed. This will open the *Project Details* section.
   - In the *Report* module: Create a report indicating **Project** as a value for the report row and click the **Submit** button. For more details on how to create and generate reports, please see Creating a Report. In the report generated, click the project link.

2. Take the necessary actions (review the provided information, update and improve as needed). You may also want to print the project details, see Printing Project Details for details. The **Close** button is used to return to the main screen.

11.2 Browsing Projects

In the *Details* section, you can browse among the projects. To browse projects, use correspondingly **Previous** or **Next** buttons in the top of the *Details* window (Figure 49).

Note: If you are accessing the *Details* section from the *Chart* module, you can also find the corresponding project in the table displayed above the project details window and click it to view its details.

11.3 Printing Project Details

In the *Details* section, you can print out the details of the selected project. In order to print out the selected project details, follow the steps below:

1. Click the (**Print**) button in the top toolbar. A window with printer settings appears.
2. Choose the printer settings as needed and press **Print**.

11.4 Adding a New Project

In the *Details* section, you may add new projects if you have been granted with the appropriate permissions.

In order to add a new project, follow the steps below:

1. Click the **New** button at the top of the *Details* window. The data input window appears which is described in the *e-ProMIS Kenya Projects Application User Manual*, see REFERENCES.
2. Provide the information requested and save.

11.5 Editing an Existing Project

In the *Details* section, you may also edit those existing projects that have been either created by yourself or you have permissions to manage.

In order to edit existing projects, follow the steps below:

1. Click the **Edit** button at the top of the *Details* window. The data input window appears which is described in the *e-ProMIS Kenya Projects Application User Manual*, see REFERENCES.
2. Make the appropriate changes in the input window and save.

12. CUSTOMIZED REPORTING

The *e-ProMIS Kenya* application allows you to customize the already-created reports in the *List*, *Chart,* and *Report* modules, i.e. to define the way the numeric values can be displayed, their format, the number of the items to be displayed, etc. You may also re-organise the reports in the desired way, i.e. include it into a group of reports or create a new report group for it, rename the report, etc. The *e-ProMIS Kenya* application can also export the reports to the desired format (Word, Excel, etc.) or print them out.

12.1 Setting Report Options

In the *List* and *Report* modules, you can set the report options, i.e. define whether the numeric values should be displayed in thousands, millions, etc.

In order to set the report options, follow the steps below:

1. Click the  **(Set Options)** button in the top toolbar. An *Options* window (Figure 50) will appear.
2. Define the format in which the numeric values should be displayed, i.e. whether the original values should be displayed or they should be shown in thousands, millions, etc. This prevents large numeric values represented by many zeros from taking a lot of space in the report.

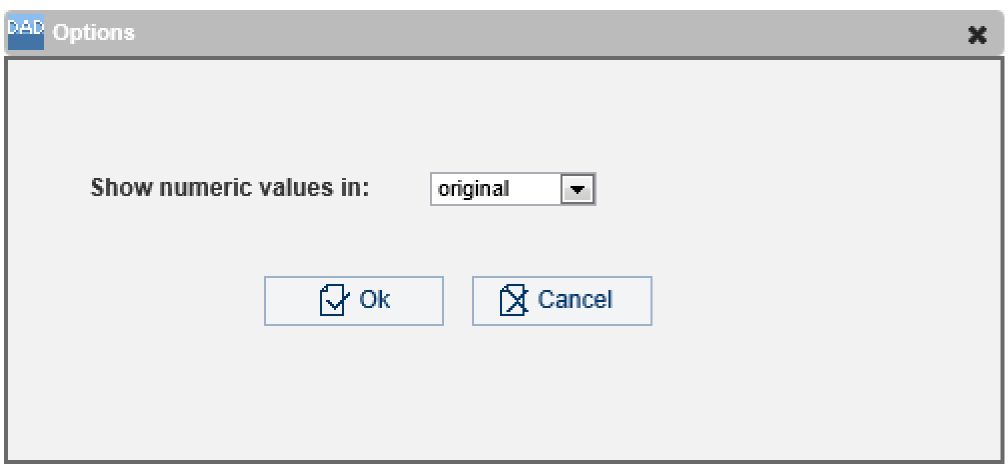


Figure 50: Setting the List Report Options

3. After finishing, click the **Ok** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.

12.2 Saving Reports

After creating reports of different types, you can save them as pre-defined reports and include them either in the *Public Reports* group and make them available for all users who access application or in the *My Reports* group available to you only.

There are two ways of saving a report in *e-ProMIS Kenya* application. You can save a newly-created report, or save a copy of an existing report with a different name, in a different location, or with a different content.

12.2.1 How to Save New Reports

From the *List*, *Chart,* and *Report* modules, you can design an appropriate report and save it. In order to save the report created, follow the steps below:

1. Click the 

 (Save) button on the top right side of the screen. A *Memorize Report* window (Figure 51) will appear.
2. Define the report name in the *Memorized Name* field.

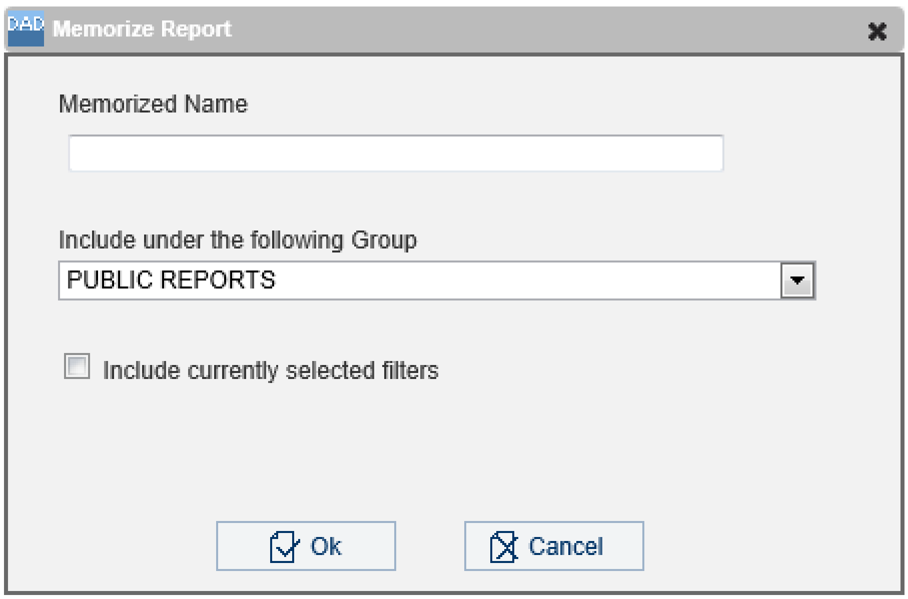


Figure 51: Memorizing a Report

3. Specify the group the report will be included in by selecting the appropriate value from the *Include under the Following Group* drop down list.
4. Check the *Include currently selected filters* checkbox to save filtering defined along with the report.
5. Click the **Ok** button to save the report for future reference or click **Cancel** to discard the changes made.

12.2.2 How to Save a Copy of the Report

In *e-ProMIS Kenya* application, you can save a copy of an existing report. The copy of the report can be saved in a different location, with a different name or edited content.

In order to save a copy of a report, follow the steps below:

1. Click the Save as **(Save As)** button on the top right side of the screen. A *Memorize Report* window (Figure 51) will appear.
2. Save the report by the steps described in the section above.

12.3 Re-organising Reports

You can organise the reports in the desired way, i.e. rename the reports, create groups to include reports under, etc.

From the *List*, *Chart,* and *Report* modules, you can design appropriate reports and organise them in the preferred way. In order to organise the reports, click the respective **(Organise Views / Charts / Reports)** button at the top right side of the screen. An *Organise Reports* window (Figure 52) will appear. You may perform the following actions:

- Renaming Reports and Report Groups
- Deleting Reports or Report Groups
- Adding a Sub-group
- Re-ordering Reports and Groups
- Setting a Report as Default

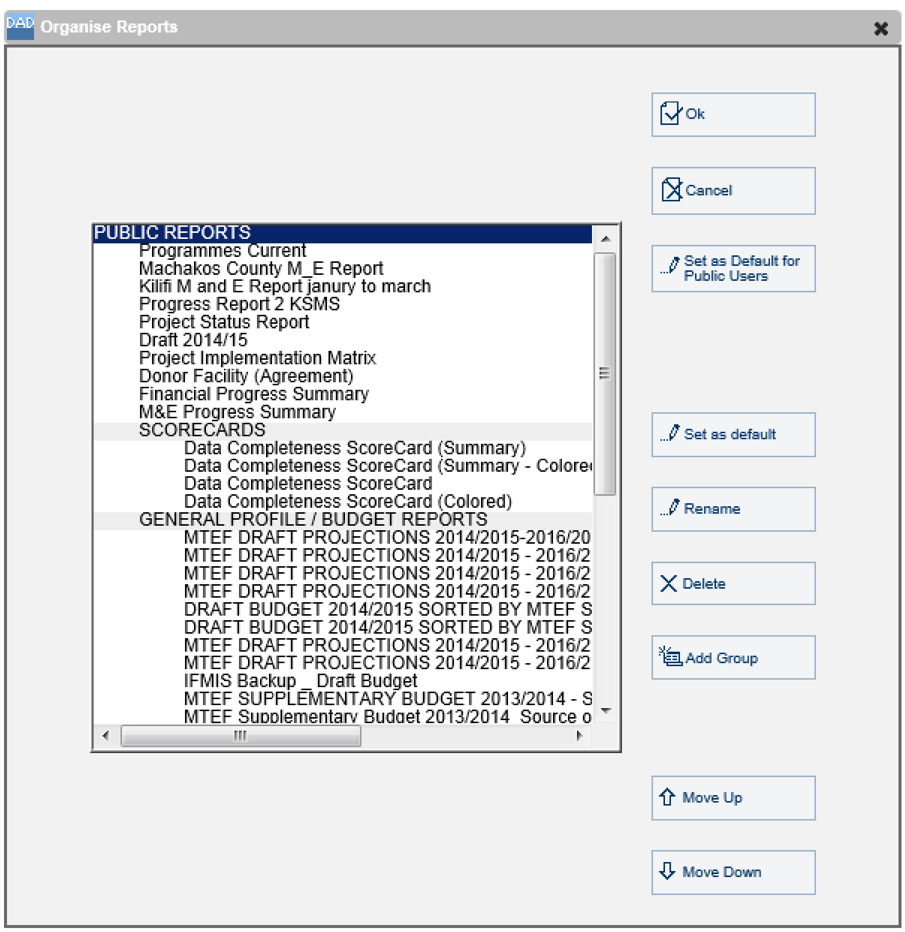


Figure 52: Organising the Reports

12.3.1 Renaming Reports and Report Groups

In order to rename a report / report group, follow the steps below:

1. Highlight the report / report group to be renamed.
2. Click the **Rename** button.
3. Fill in the desired name for the report / report group.
4. Click the **Enter** keyboard button to confirm renaming.

Note: *Public Reports* and *My Reports* groups cannot be renamed.

12.3.2 Deleting Reports or Report Groups

In order to delete a report / report group, follow the steps below:

1. Highlight the report / report group to be deleted.
2. Click the **Delete** button.
3. Click the **Ok** button to confirm deletion.

Note: *Public Reports* and *My Reports* groups cannot be deleted.

12.3.3 Adding a Sub-group

In order to add a sub-group, follow the steps below:

1. Click the **Add Group** button.
2. Fill in the desired name for the sub-group.
3. Click the **Enter** keyboard button to confirm adding.

12.3.4 Re-ordering Reports and Groups

In order to re-order reports / report groups, follow the steps below:

1. Highlight the report / report group the sorting order of which needs to be changed.
2. Click the **Move Up / Move Down** button.

12.3.5 Setting a Report as Default

In order to set a report as default, follow the steps below:

1. Highlight the report to be displayed in the respective module when you access it.
2. Click the **Set as default** button. The selected report will be marked with *(default for me)* option.
3. If you need to set the report as default for public user access, click the **Set as Default for Public Users** button. The selected report will be marked with *(default for public users)* option.

Note: This option is available only in the *Chart* and *Report* modules.

12.4 Viewing Pre-defined Reports

In the *List, Chart,* and *Report* modules, you can view the pre-defined reports stored under **Public Views/Charts/Reports** or **My Views/Charts/Reports** section (see *Main Menu Bar* description in e-ProMIS KENYA ANALYTICAL INTERFACE STRUCTURE) for data analysis and comparison. For this purpose, select the report to display and click one of the following **Generate Report** buttons to the left of the report name:

- - in the *List* module;
- - in the *Chart* module;
- - in the *Report* module.

The selected report will open in the application window (*List* and *Chart* modules) or a new window (*Report* module). The same results can be achieved if you click the report name.

12.5 Editing Pre-defined Reports

To save you the time and the effort of structuring a report from the scratch when it is necessary to introduce some modifications in any of the pre-defined reports stored under **Public Reports** or **My Reports**, the *Edit* option has been designed in the *Report* module.

In order to edit reports, click the **(Edit)** button to the left of the report to edit. The selected report structure will be loaded in the application window giving you the possibility of formatting and styling it in the desired way. For more details on how to apply formatting to the reports, see Customizing Reports.

The pre-defined *List* and *Chart* reports stored in **Public Views/Charts** or **My Views/Charts** can also be edited after you have selected to view them (see Viewing Pre-defined Reports). Once the selected report is loaded in the application window, make the appropriate changes and save them. If you wish to keep the modifications, do not forget to save the modified report, see Saving Reports.

12.6 Exporting Reports

From the *Chart* and *Report* modules, you can design appropriate reports and export them in the PDF, MS Word and MS Excel formats.

In order to export the reports in the PDF, MS Word and MS Excel formats, follow the steps below:

1. Click the respective **(Export in PDF Format)** / **(Export in MS Word Format)** / **(Export in MS Excel Format)** button. A separate window will open.
2. Make changes, if necessary.

12.7 Printing Reports

From the *Chart* and *Report* modules, you can design appropriate reports and print them out.

In order to print out the selected report, follow the steps below:

1. Click the  **(Print)** button on the top toolbar in the right side of the screen. A separate window will open.
2. Select the *Print* option.

13. FILTERING

The system allows for data filtration. Filtering is used to narrow down the information displayed in the reports. The filtration works in the Step-by-Step technology, which is used to implement new filtering over the results of the previous one. This option reduces the size of reports and makes them easier to read. Filters can be added to new or existing reports. Defined filtering is applicable for lists, reports, and charts.

The list of the most frequently-used filter categories is displayed under the *Filter By:* section. The list of all available filter categories is displayed when you click the **More Filters** link.

13.1 Creating Filtering Criteria

In order to create filtering criteria, follow the steps below:

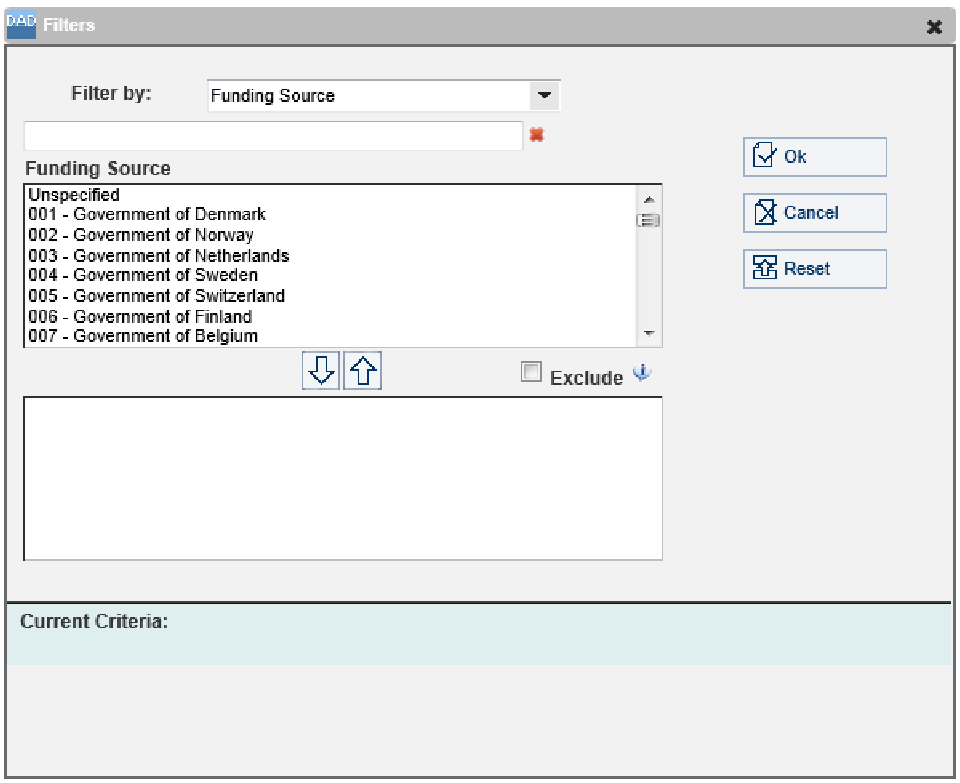


Figure 53: Filters

1. Click the hyperlink under the *Filters* section that represents the *Category* according to which the filtering will be carried out. A *Filters* window (Figure 53) will appear having the *Category Item* pull down menu set to the selected *Category*. The first text area holds a list of all the available *Category* items that the report could display, whereas the second text area holds a sub-set list of the first one. You may only edit the sub-set list in the second text area. At the end of the filtering, if the sub-set list is empty, all the *Category* items will be included in the report. If, however, the sub-

set is non-empty, only the items in the sub-set list will be included in the report. At the bottom of the pop-up window the selection criteria from all categories are presented. This view is also available from the main screen by clicking the 

button.

2. Select a *Category* item from the list in the first text area.
   Note: In case the category items list is long and hard to browse in, you can search for a specific item(s) by providing search criteria in the respective field. The search result will return all possible matches (Figure 54).
3. Click the downward-pointing arrow button to add the item selected to the list in the second text area (Figure 55).
4. Repeat steps 2 and 3 to add more than one *Category* item.
   Note: If a *Category* item needs to be removed from the second text area, select it from the list in the second text area and click the upward-pointing arrow button.
5. Click the **Ok** button to apply the filtering to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List or Chart). The system will regenerate and download, to the client's side, an updated report that applies the updated filtering criteria.

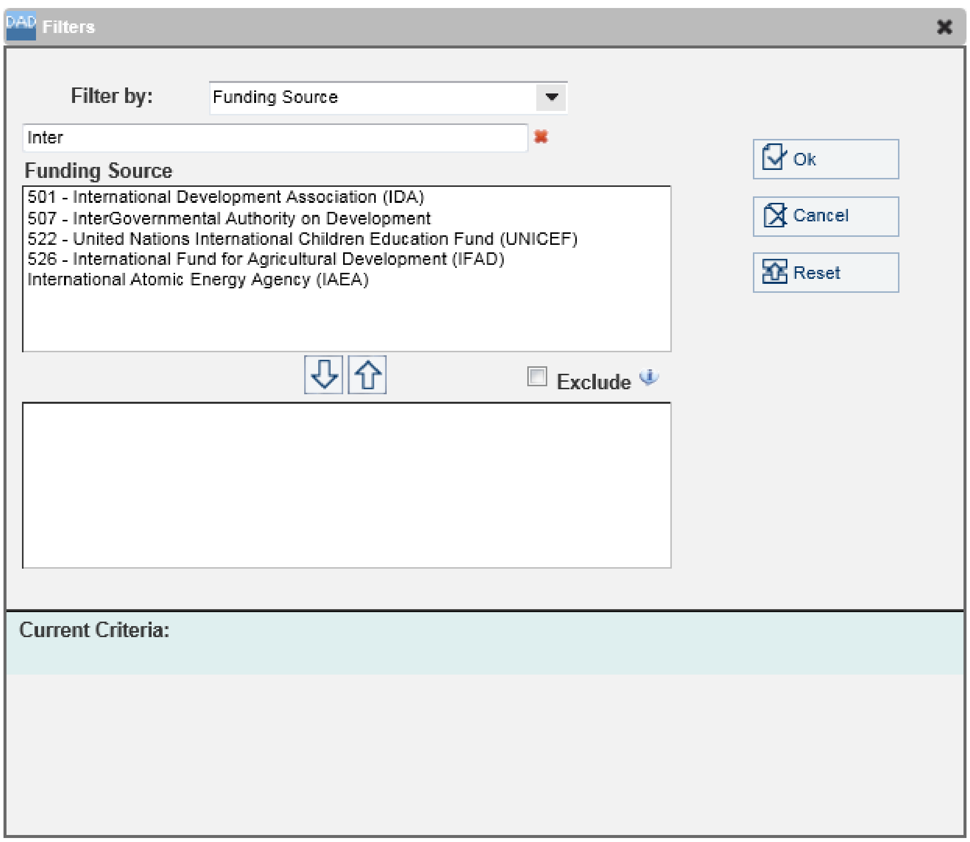


Figure 54: Searching for a Category Item

Note: It is possible to exclude a *Category* item(s) from being included into the filtering criteria to be created. In this case, tick the *Exclude* check box. All the *Category* items that appear in the second text area will be excluded from the filtering criteria to be created.

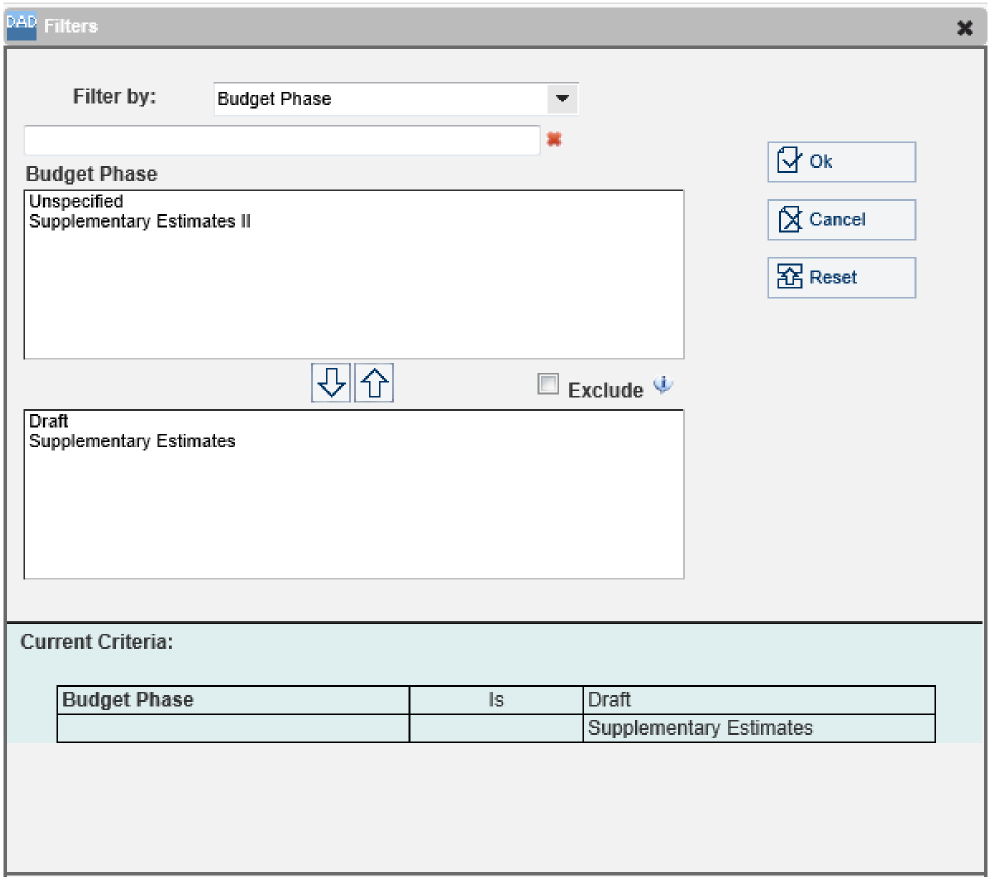


Figure 55: Selecting Category Items

13.2 Sample Filtering Criteria

If **Budget Phase** has been selected as filtering category and **Draft** and **Supplementary Estimates** as category items, the following results will be acquired (Figure 56).

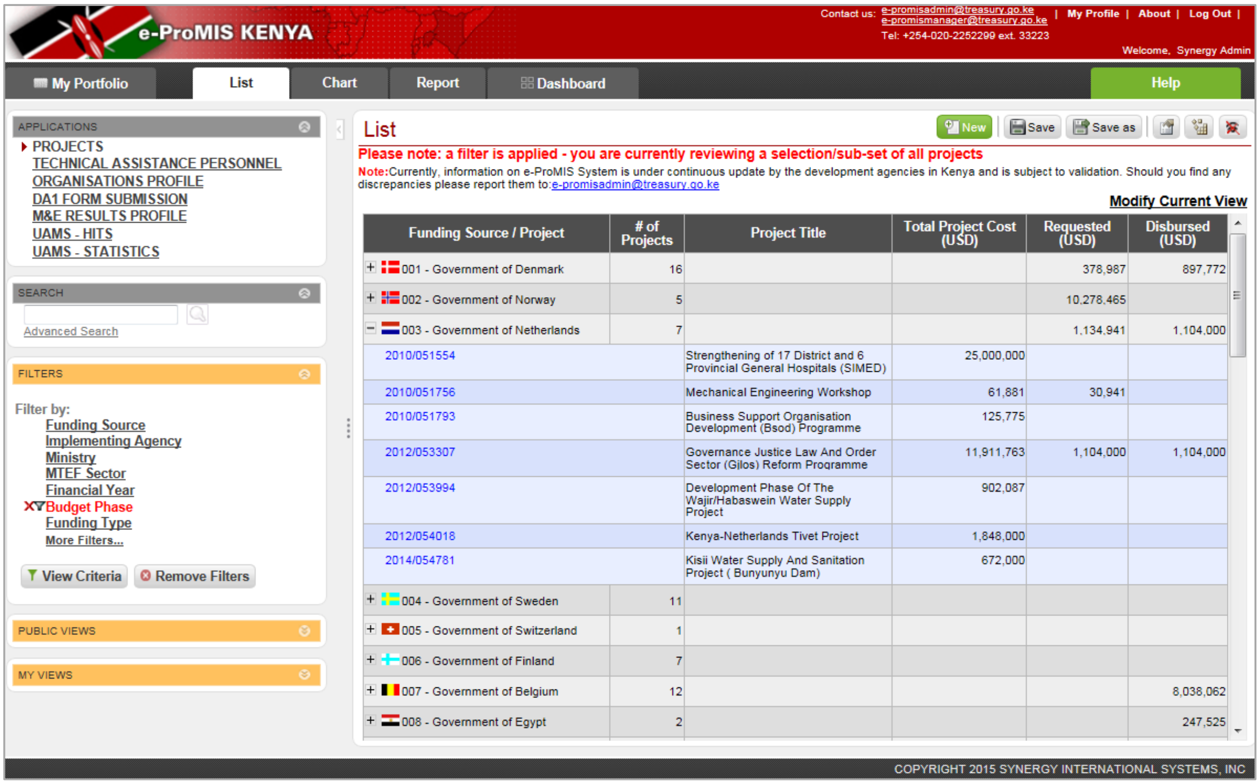


Figure 56: Filtered List

14. SEARCH

The *e-ProMIS Kenya* application is equipped with a comprehensive search mechanism, which allows searching for any relevant information.

14.1 Simple Search

The simple search interface is available to find any relevant information quickly and easily within the integrated *e-ProMIS Kenya* content. Simple search implies that you can type search operators directly into the search box.

14.2 Advanced Search

In addition to providing easy access to the content, *e-ProMIS Kenya* application has a number of specific features that is used to find exactly what is looked for. One of these features is advanced search that allows setting different complex conditions using the *Advanced Search* form. It gives several additional fields which may be used to qualify searches by such criteria as project title, description, MTEF sector, etc.

In order to create search criteria, follow the steps below:

1. Click the **Advanced Search** link under the *Search* section. The *Advanced Search* form appears (Figure 57).

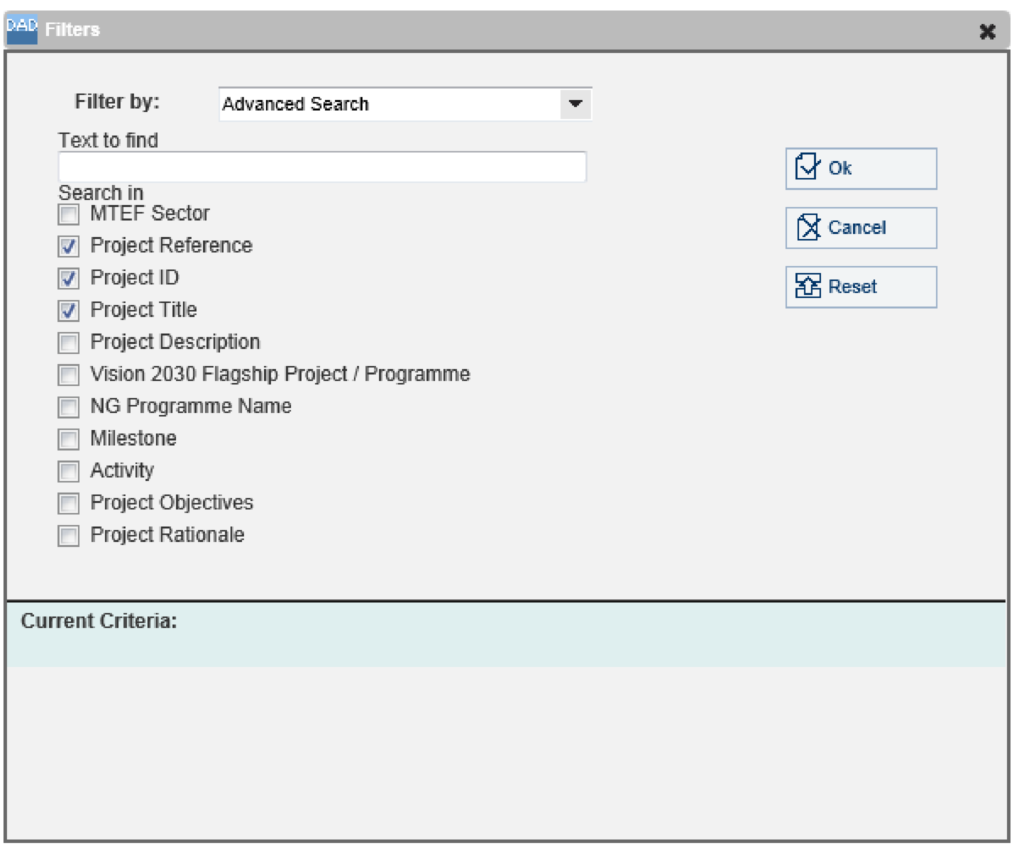


Figure 57: Advanced Search Section

2. Define the text to search for in the appropriate field.
3. Specify the fields to look in by selecting the appropriate checkbox(es).
4. Click the **Ok** button to apply the search criteria to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List or Chart).

14.3 Sample Search Criteria

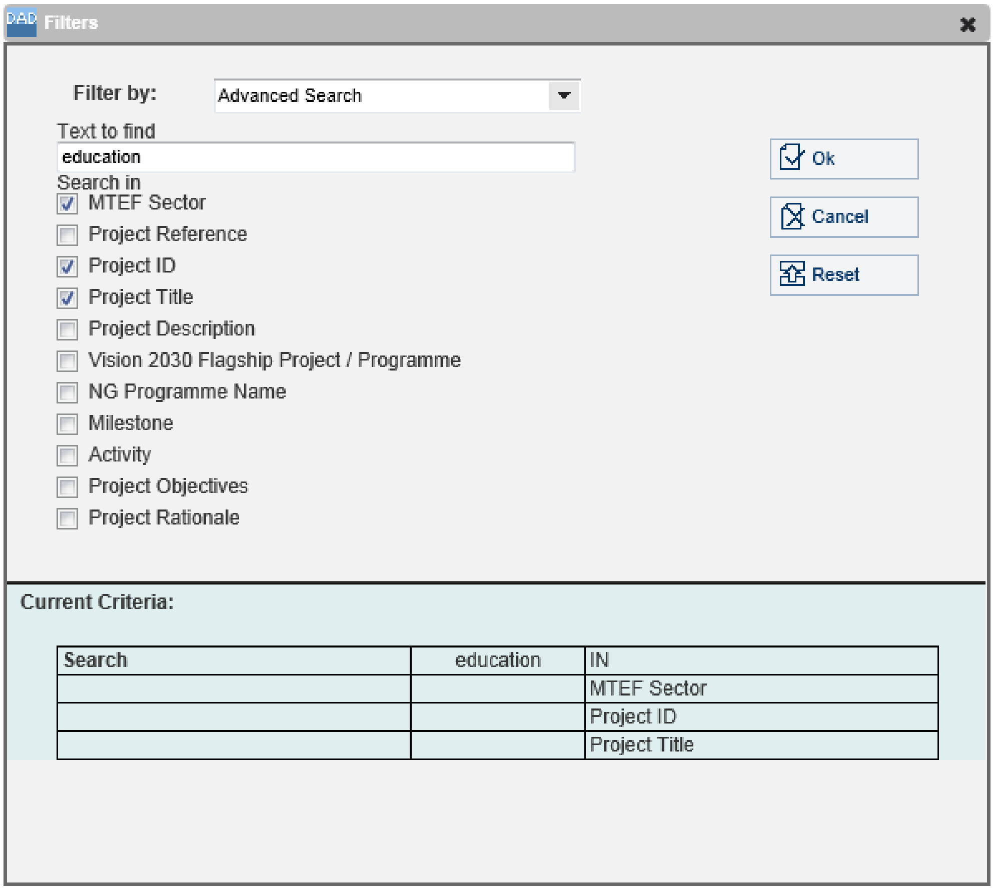


Figure 58: Defining Search Criteria

If you have selected to search for **education** among project titles, project descriptions, and sectors (Figure 58), the following search results will appear (Figure 59).

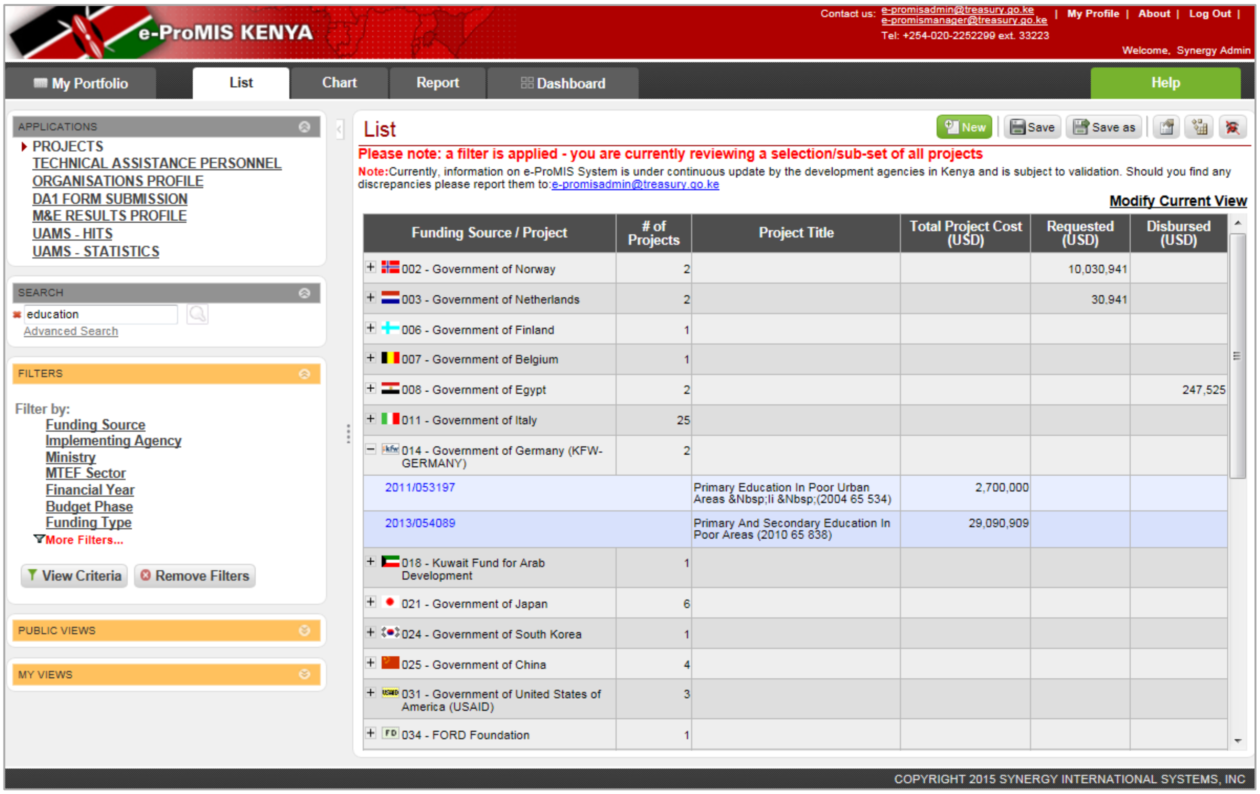


Figure 59: Search Results

15. STATISTICS IN E-PROMIS KENYA

E-ProMIS Kenya is integrated with statistical packages designed for the system administrators who will use hits metrics to measure user activity in the application. The actions taken by the users in various modules and applications in *E-ProMIS Kenya* are recorded and stored in the database for data analysis, data management, and reporting.

The statistical packages in *E-ProMIS Kenya* are represented by two applications:

- UAMS – Hits
- UAMS – Statistics

15.1 UAMS – Hits Application

The **UAMS – Hits** application in *E-ProMIS Kenya* is a feature-rich analytical tool designed to collect a wide range of user behavior statistics. It is a useful surveillance tool intended for the system administrators to gather aggregate performance statistics on user activity in the system as well as track system usage. The hits statistics is used by the system administrators with the aim of monitoring user activity and helping tighten security policies.

15.1.1 Key Features

The **UAMS – Hits** application is used to collect information on:

- Users logged into the system
- User access to a definite application
- User access to a definite module
- Actions taken by the user in different applications and modules
- User sessions
- Number of hits made
- Time (in minutes and hours) the user spent using the system

The user activity data in the **UAMS – Hits** application can be organised by:

- Users
- Organisation and/or country the user represents
- Specific period of time (day, week, month, quarter, year)
- User sessions
- Applications

15.1.2 Reporting in UAMS – Hits

In order to describe, organise, and summarize the user activity data, it is possible to create various reports for better visualization, data analysis, and comparison. For example, it may be necessary to compare the user activity in *E-ProMIS Kenya* during last year with that

during the current year. For this purpose, it is possible to draw up different reports to be able to perform this task. The reports in **UAMS – Hits** can be of the following types:

- List Reports
- Chart Reports
- Table Reports

Once the appropriate report is designed and styled, it is possible to take several actions for customized reporting. These actions involve:

- Setting Report Options
- Saving Reports
- Re-organising Reports
- Viewing Pre-defined Reports
- Editing Pre-defined Reports
- Exporting Reports
- Printing Reports

Note: The reports that have been saved appear as pre-defined in the system. Pre-defined reports can be arranged into dashboards thus giving the system administrators a way to track user hits metrics in an easy-to-manage environment. Dashboards can be very useful as they provide a summary of the vital user activity data. For more information on how to create and manage dashboards, see DASHBOARD MODULE.

15.1.2.1 List Reports

List reports are created and managed in the LIST MODULE. List reports are characterized by each record being represented with a set of rows and columns. The *List* module offers flexible options for grouping the records according to the available criteria (e.g. country the user comes from, the organisation he or she represents, etc.) Arranging list items in groups will help to see patterns and total up key amounts for comparison.

For more details on creating list and crosstab list reports and arranging the report rows and columns, see LIST MODULE.

Sample List Reports

Sample List Report 1 (Figure 60) provides information about user actions grouped by country. The report helps to compare the number of actions taken by different users as well as the duration of time they spent using the system.

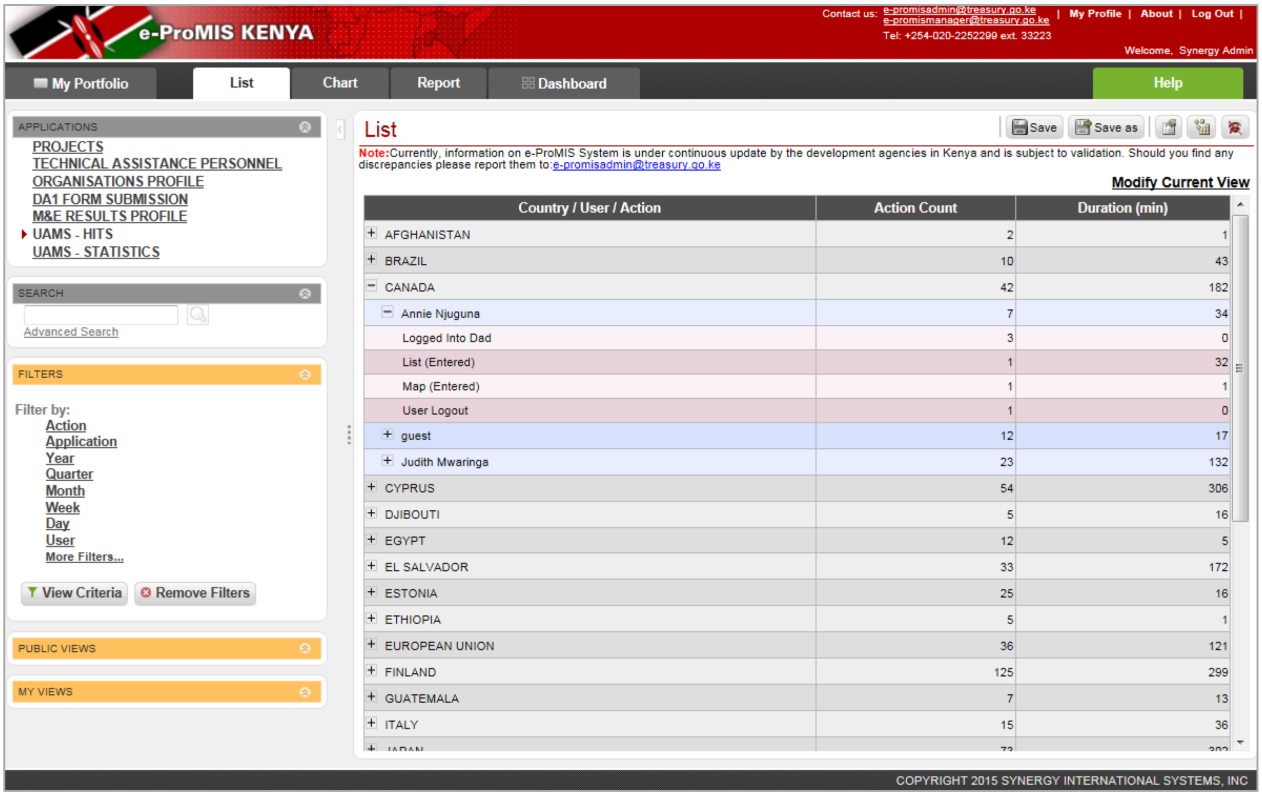


Figure 60: Sample List Report 1

Sample List Report 2 (Figure 61) provides information about user actions sorted by sessions. The report helps to compare the number of actions taken by different users as well as the duration of time they spent using the system during one session.

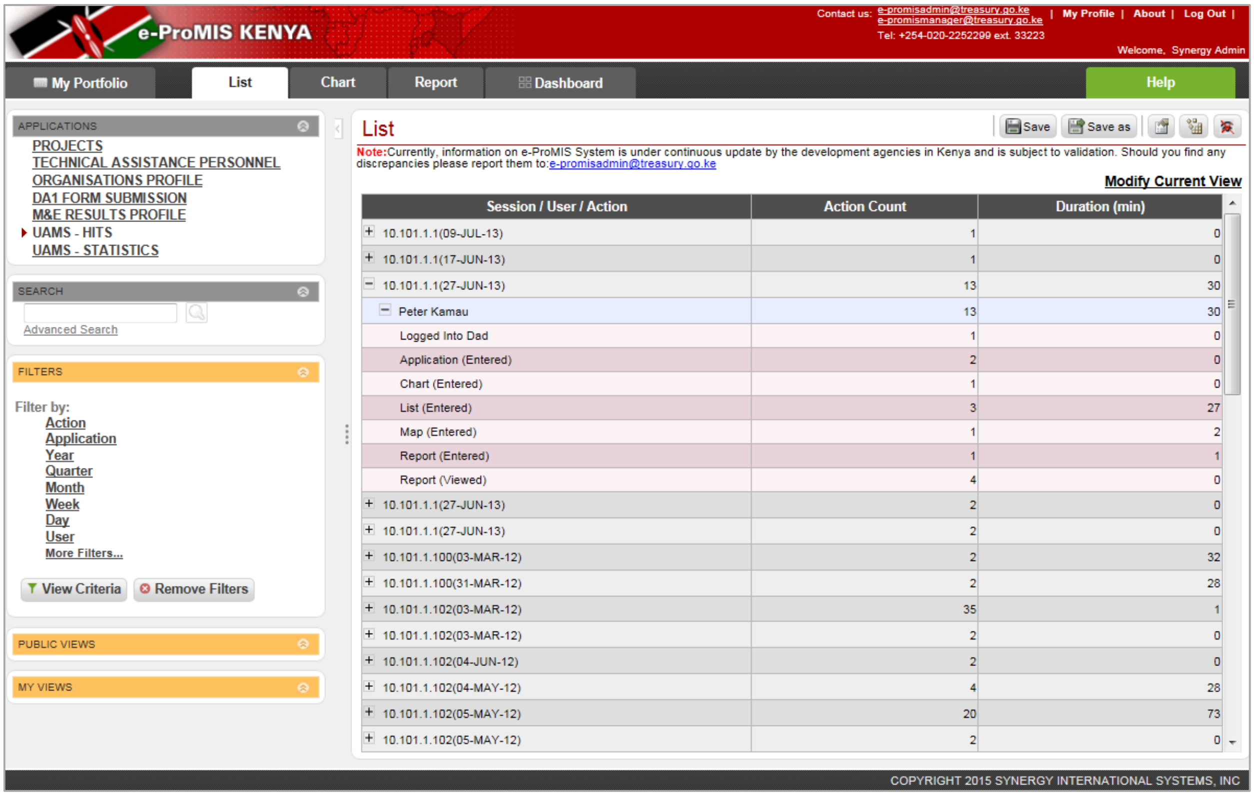


Figure 61: Sample List Report 2

A list report can be very informative. However, it is possible to draw more information out of the data to be analyzed by enhancing the list report with crosstabs. Crosstab List reports are much more flexible in terms of table design because they allow grouping records in rows or columns in such a way that another dimension in which to display information is added. Instead of just showing the number of user actions by country, it is possible to display this information across all applications in *E-ProMIS Kenya*.

Sample Crosstab List Report

Sample Crosstab List Report (Figure 62) displays the same data as Sample List Report 1 (Figure 60) but in an added dimension. It shows not only the user actions by country, but also the number of actions taken by different users as well as the duration of time they spent in different applications of the system.

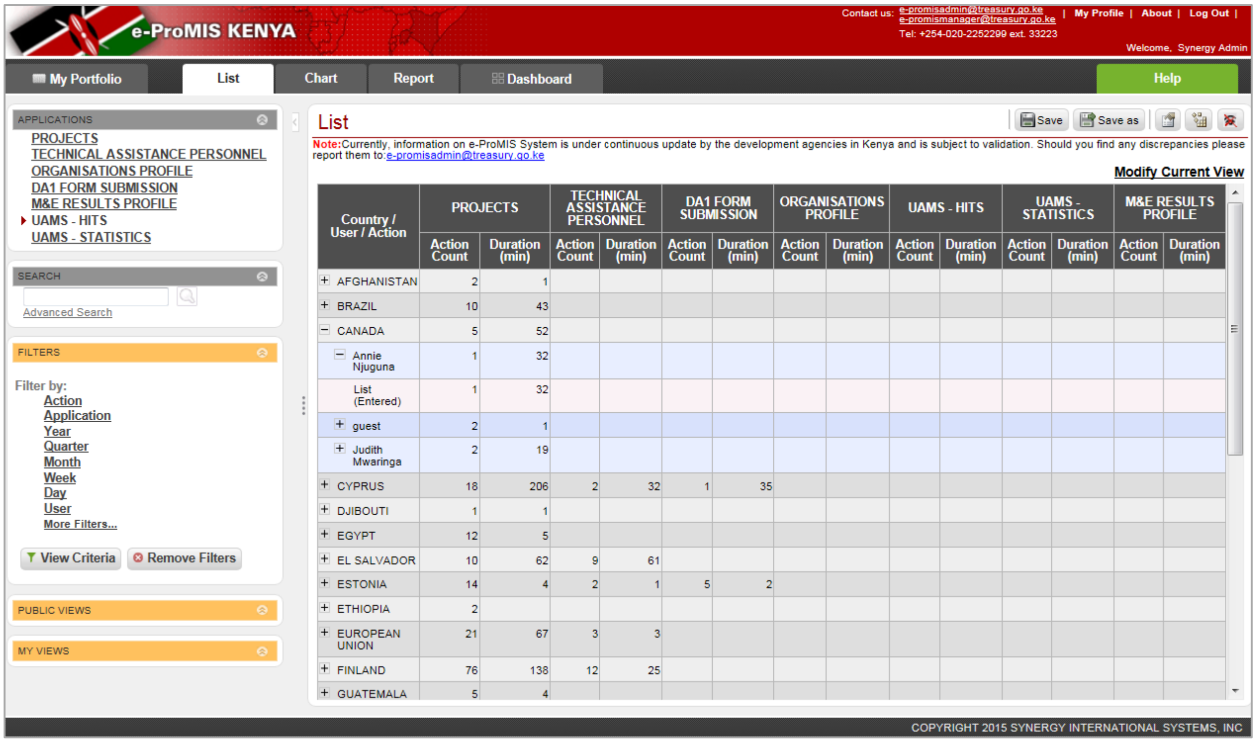


Figure 62: Sample Crosstab List Report

15.1.2.2 Chart Reports

Chart reports are created and managed in the CHART MODULE. Chart reports are visual representation of the data to be analyzed. Unlike list and table reports where the data is presented in rows and columns, chart reports give the viewer an immediate understanding of the data. The *Chart* module offers a number of ways for better data visualization (e.g. data can be presented in the form of different charts; it is possible to activate data table and legend options; etc.)

For more details on creating chart reports and setting viewing options, see CHART MODULE.

Sample Chart Reports

Sample Chart Report 1 (Figure 63) provides information about user actions taken sorted by months. The report helps to compare the number of actions taken by different users as well as the duration of time they spent using the system during one month. The data is presented in the form of a 3D Column chart.

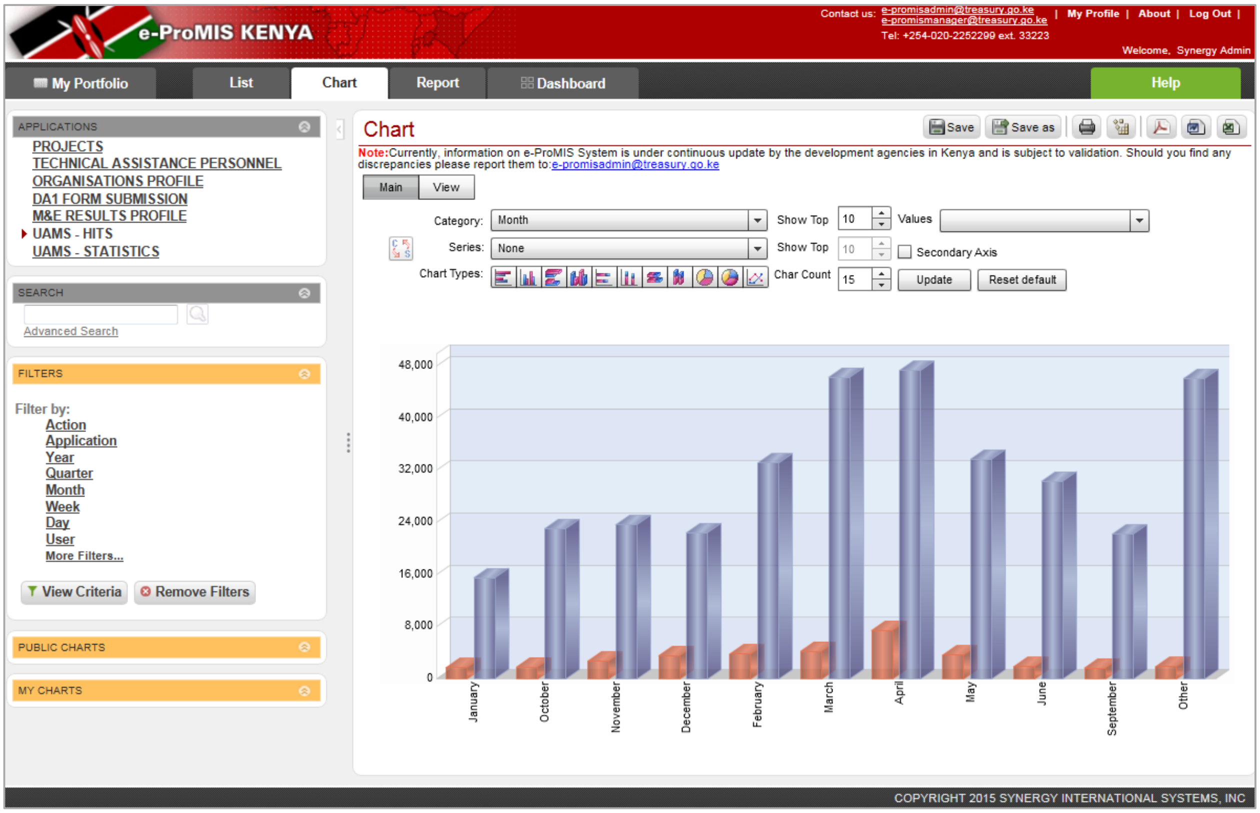


Figure 63: Sample Chart Report 1

Sample Chart Report 2 (Figure 64) provides information about user actions taken sorted by months. The report helps to compare the number of actions taken by different users during one month. The data is presented in the form of a 3D Pie chart. For better understanding, data table and legend are displayed.

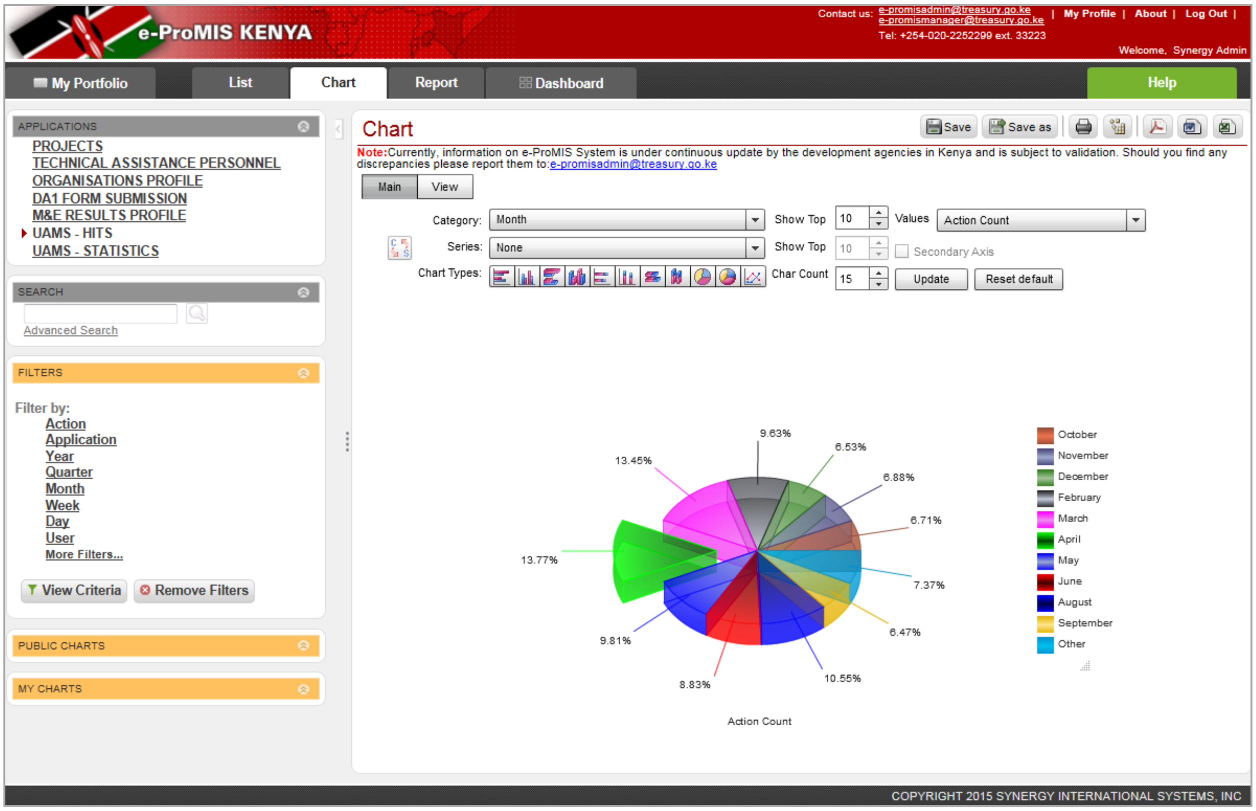


Figure 64: Sample Chart Report 2

Sample Chart Report 3 (Figure 65) provides information about the actions taken by the users. The report helps to compare the number of actions taken by different users as well as the duration of time (in minutes and hours) they spent using the system. The data is presented in the form of a Line chart. For better understanding, data legend is displayed.

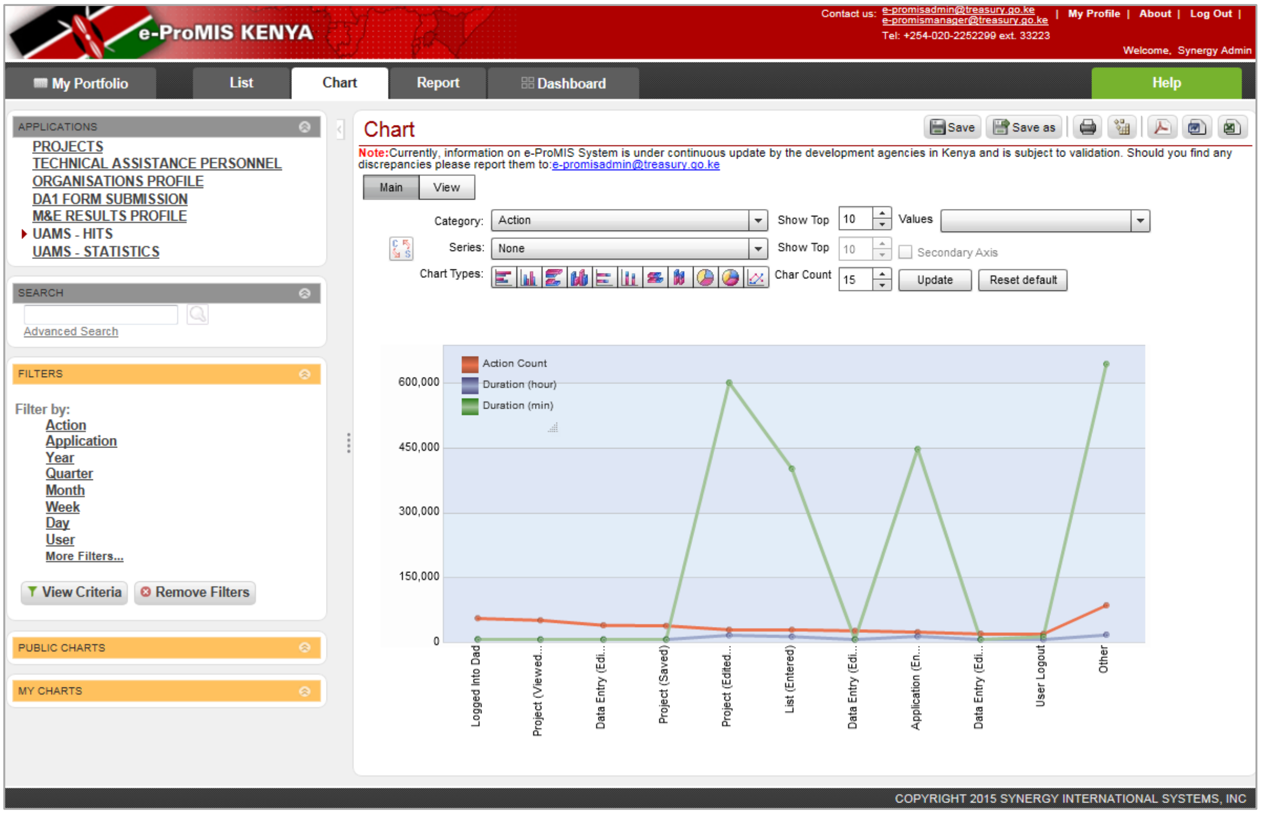


Figure 65: Sample Chart Report 3

15.1.2.3 Table Reports

Table reports are created and managed in the REPORT MODULE. Table reports are a convenient way of presenting more than one record at a time. A basic table report consists of rows and columns, where each row is one record and each column is a field. The *Report* module offers a comprehensive methods and techniques for table report design and customization (e.g. it is possible to group records in different tables according to the report grouping selected; apply formatting; define totals to show before the data, etc.)

For more details on creating, customizing, and formatting table reports, see REPORT MODULE.

Sample Table Reports

Sample Table Report 1 (Figure 66) provides information about the actions taken by the users from different countries. The report helps to compare the number of actions taken by different users as well as the duration of time (in hours) they spent using the system. Some formatting and styling is applied.

REPUBLIC OF KENYA

Note:Currently, information on e-ProMIS Kenya is under continuous update by the development agencies in Kenya and will be subject to validation in the time to come. Should you find any discrepancies please report them to:e-promisadmin@treasury.go.ke

USER ACTIONS BY COUNTRY

User / Action	Action Count	Duration (hour)
Abdi Aden		
Logged Into Dad	8	0
Chart (Entered)	1	0
List (Entered)	1	2
Abdi Aden		
Logged Into Dad	2	0
Chart (Entered)	1	0
List (Entered)	1	0
Abdi Gorod		
Logged Into Dad	10	0
Application (Entered)	1	0
List (Entered)	6	2
Project (Viewed)	6	
Report (Entered)	4	0
User Logout	1	0
Abdi Hared Gorod		
Logged Into Dad	1	0
Chart (Entered)	2	0
List (Entered)	2	0
Map (Entered)	1	0
Map (Modified)	1	0
Report (Entered)	2	0
Abdulkarim Mohamed		
Logged Into Dad	20	0
Chart (Entered)	2	0
Data Entry (Edited Tab 1)	26	
Data Entry (Edited Tab 2)	12	
Data Entry (Edited Tab 3)	7	
Data Entry (Edited Tab 4)	9	
Data Entry (Edited Tab 5)	1	
(Edited Tab 7)	1	

Figure 66: Sample Table Report 1

Sample Table Report 2 (Figure 67) provides information about the actions taken by the users representing different organisations. The report helps to compare the number of actions taken by different users as well as the duration of time (in hours) they spent using the system. Some formatting and styling is applied.

REPUBLIC OF KENYA

Note:Currently, information on e-ProMIS Kenya is under continuous update by the development agencies in Kenya and will be subject to validation in the time to come. Should you find any discrepancies please report them to:e-promisadmin@treasury.go.ke

USER ACTIONS BY ORGANISATIONS

Organisation / User / Action	Action Count	Duration (hour)
Office of the Deputy Prime Minister and Ministry of Local Government		
Kenneth Omomdi Nyaseda		
Logged Into Dad	4	0
Data Entry (Edited Tab 1)	3	
Data Entry (Edited Tab 2)	2	
Data Entry (Edited Tab 3)	4	
Data Entry (Edited Tab 4)	2	
Data Entry (Edited Tab 5)	2	
Data Entry (Edited Tab 6)	1	
Data Entry (Edited Tab 7)	1	
List (Entered)	2	1
Map (Entered)	1	0
Map (Modified)	1	0
Project (Created New)	2	
Project (Edited)	1	
Project (Saved)	16	
Project (Viewed)	1	
Report (Entered)	2	0
Report (Viewed)	1	0
Access Kenya		
Joanne Mathenge		
Logged Into Dad	25	0
Application (Entered)	26	0
Chart (Entered)	4	0
Data Entry (Edited Tab 1)	20	
Data Entry (Edited Tab 2)	16	
Data Entry (Edited Tab 4)	1	
List (Entered)	38	19
Map (Entered)	4	0
Project (Created New)	1	
Edited)		

Figure 67: Sample Table Report 2

15.1.3 Data Filtering in UAMS – Hits

Data filtering can be of high importance in cases when it is necessary to view a sub-set of the data stored. To make it easier to view and analyze data, it is necessary to create and apply filtering criteria on the basis of the available filtering categories.

In **UAMS – Hits**, filters provide a way to return a more refined and finely-targeted set of data on user activities. For example, it is possible to filter the data based on such things as users, actions, applications, etc. For more details on how to create filtering criteria, see FILTERING.

15.2 UAMS – Statistics Application

The **UAMS – Statistics** application in *E-ProMIS Kenya* is a complete analytical tool used by the system administrators to track the number of users logged into the system within a specific period of time. The ability to collect information on the application traffic will assist the system administrators in troubleshooting performance problems, reducing system downtime, and increasing network performance.

15.2.1 Key Features

The **UAMS – Statistics** application is used to collect information on:

- Number of Regular Users logged into the system;
- Number of Guest/Public Users logged into the system;
- Number of Off-line Users logged into the system.

The user traffic in the **UAMS – Statistics** application can be organised by:

- Hour
- Day
- Week
- Month
- Quarter
- Year

15.2.2 Reporting in UAMS - Statistics

In order to describe, organise, and summarize the user access data, it is possible to create various reports for better visualization, data analysis, and comparison. For example, it may be necessary to compare the number of online and off-line users logged into the system. Or, it may be necessary to determine the exact number of users active in the system with the aim of preventing the system from crashing. For this purpose, it is possible to draw up different reports to be able to perform these tasks. The reports in **UAMS – Statistics** can be of the following types:

- List Reports
- Chart Reports
- Table Reports

Once the appropriate report is designed and styled, it is possible to take several actions for customized reporting. These actions involve:

- Setting Report Options
- Saving Reports
- Re-organising Reports
- Viewing Pre-defined Reports
- Editing Pre-defined Reports
- Exporting Reports
- Printing Reports

Note: The reports that have been saved appear as pre-defined in the system. Pre-defined reports can be arranged into dashboards thus giving the system administrators a way to track user statistics in an easy-to-manage environment. Dashboards can be very useful as

they provide a summary of the vital user traffic statistics. For more information on how to create and manage dashboards, see DASHBOARD MODULE.

15.2.2.1 List Reports

List reports are created and managed in the LIST MODULE. List reports are characterized by each record being represented with a set of rows and columns. The *List* module offers flexible options for grouping the records according to the available criteria (e.g. day, hour, etc.) Arranging list items in groups will help to see patterns and total up key amounts for comparison.

For more details on creating list and crosstab list reports and arranging the report rows and columns, see LIST MODULE.

Sample List Reports

Sample List Report 1 (Figure 68) provides information about the number of users logged into the system within a specific timeframe. The report helps to compare the number of logged-in users during different hours of the day.

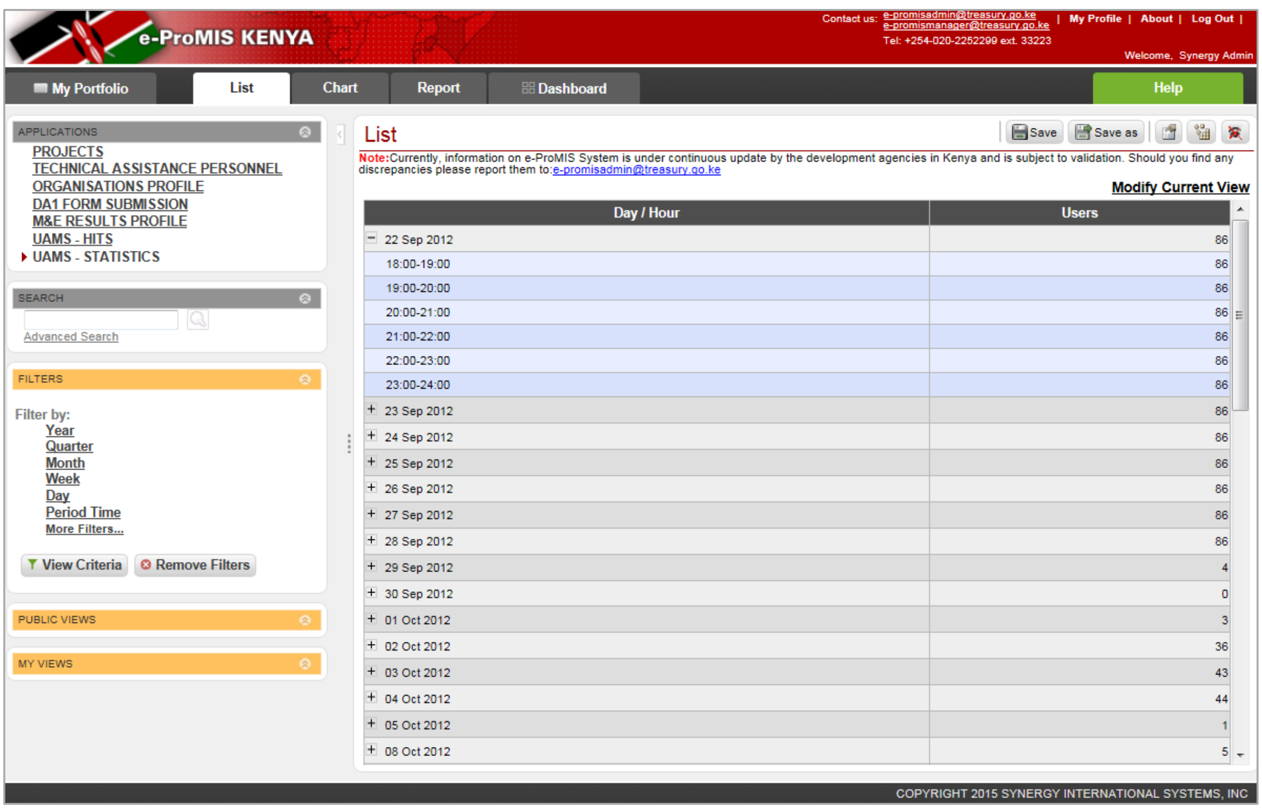


Figure 68: Sample List Report

A list report can be very informative. However, it is possible to draw more information out of the data to be analyzed by enhancing the list report with crosstabs. Crosstab List reports are much more flexible in terms of table design because they allow grouping records in rows

or columns in such a way that another dimension in which to display information is added. Instead of just showing the number of logged-in users during a specific hour of the day, it is possible to display this information across all weeks of the year.

Sample Crosstab List Report

Sample Crosstab List Report (Figure 69) displays the same data as Sample List Report 1 (Figure 68) but in an added dimension. It shows not only the number of logged-in users during a specific hour of the day, but also during the weeks of the year.

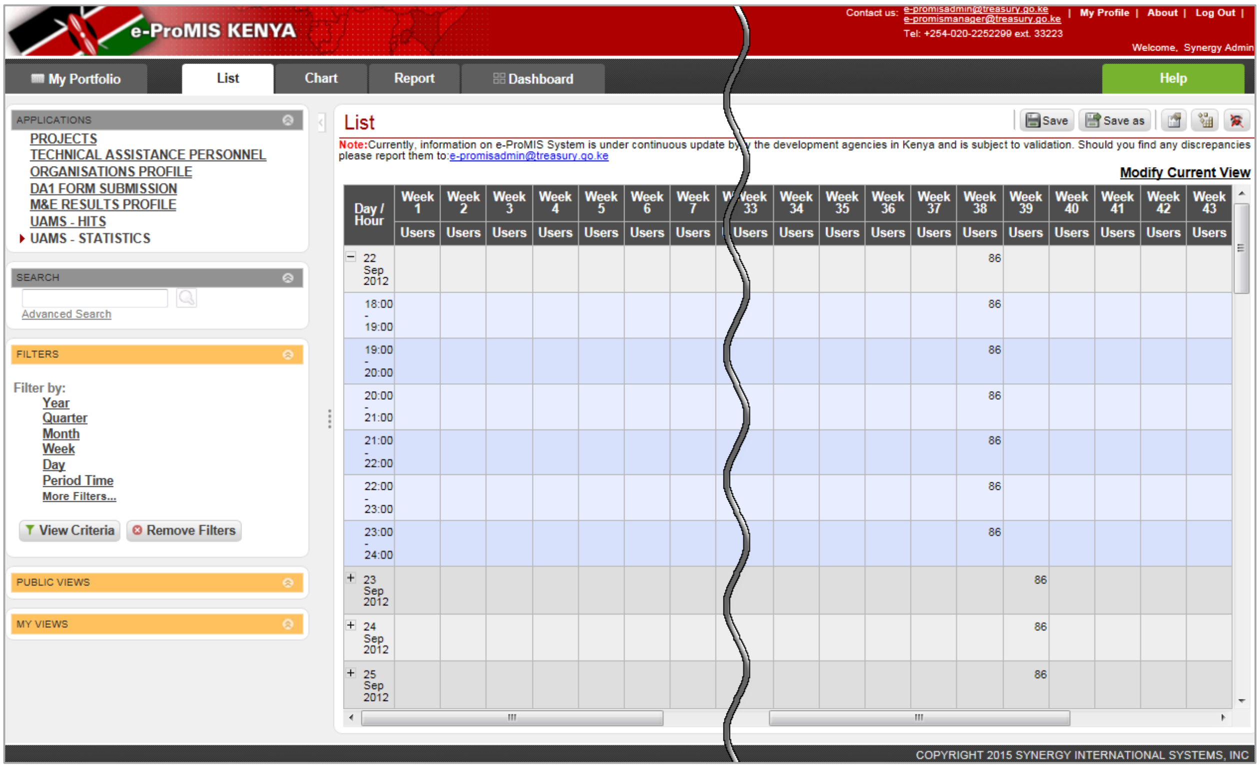


Figure 69: Sample Crosstab List Report

15.2.2.2 Chart Reports

Chart reports are created and managed in the CHART MODULE. Chart reports are visual representation of the data to be analyzed. Unlike list and table reports where the data is presented in rows and columns, chart reports give the viewer an immediate understanding of the data. The *Chart* module offers a number of ways for better data visualization (e.g. data can be presented in the form of different charts; it is possible to activate data table and legend options; etc.)

For more details on creating chart reports and setting viewing options, see CHART MODULE.

Sample Chart Reports

Sample Chart Report 1 (Figure 70) provides information about the number of 'regular', guest/public, and off-line users logged into the system within a day. The data is presented in the form of a 3D Column chart. For better understanding, data label and legend are displayed.

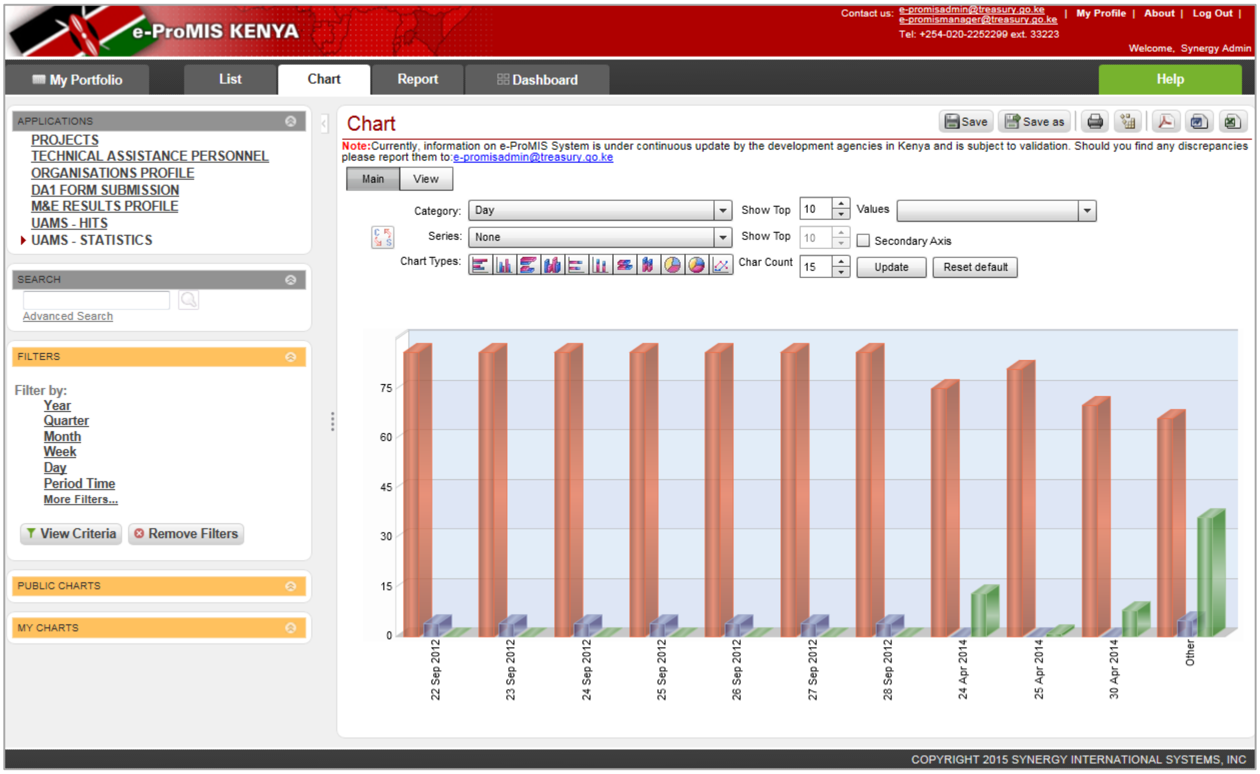


Figure 70: Sample Chart Report

15.2.2.3 Table Reports

Table reports are created and managed in the REPORT MODULE. Table reports are a convenient way of presenting more than one record at a time. A basic table report consists of rows and columns, where each row is one record and each column is a field. The *Report* module offers a comprehensive methods and techniques for table report design and customization (e.g. it is possible to group records in different tables according to the report grouping selected; apply formatting; define totals to show before the data, etc.)

For more details on creating, customizing, and formatting table reports, see REPORT MODULE.

Sample Table Reports

Sample Table Report 1 (Figure 71) provides information about the number of 'regular', guest/public, and off-line users logged into the system within a specific timeframe (week / day / hour). Some formatting and styling is applied.

REPUBLIC OF KENYA

Note: Currently, information on e-ProMIS Kenya is under continuous update by the development agencies in Kenya and will be subject to validation in the time to come. Should you find any discrepancies please report them to: e-promisadmin@treasury.go.ke

Day / Hour	Users	Guest/Users Public	Off-line Users
22 Sep 2012			
18:00-19:00	86	0	4
19:00-20:00	86	0	4
20:00-21:00	86	0	4
21:00-22:00	86	0	4
22:00-23:00	86	0	4
23:00-24:00	86	0	4
23 Sep 2012			
00:00-1:00	86	0	4
01:00-2:00	86	0	4
02:00-3:00	86	0	4
03:00-4:00	86	0	4
04:00-5:00	86	0	4
05:00-6:00	86	0	4
06:00-7:00	86	0	4
07:00-8:00	86	0	4
08:00-9:00	86	0	4
09:00-10:00	86	0	4
10:00-11:00	86	0	4
11:00-12:00	86	0	4
12:00-13:00	86	0	4
13:00-14:00	86	0	4
14:00-15:00	86	0	4
15:00-16:00	86	0	4
16:00-17:00	86	0	4
17:00-18:00	86	0	4
18:00-19:00	86	0	4
19:00-20:00	86	0	4
20:00-21:00	86	0	4
21:00-22:00	86	0	4
22:00-23:00	86	0	4
23:00-24:00	86	0	4
24 Sep 2012			
			4

Figure 71: Sample Table Report

15.2.3 Data Filtering in UAMS - Statistics

Collecting information is often much easier than understanding or analyzing it. This is especially true in cases where large volume data are involved. One common challenge is that it is hard to drill down into the data that need to be found quickly. To solve the problem, it is necessary to apply a filter onto a dataset to narrow it down and to find the data needed.

In **UAMS – Statistics**, filters provide a way to analyze a sub-set of data collected based on the specified conditions. For example, it is possible to create filtering criteria based on specific timeframe: day, month, week, etc. For more details on how to apply filters, see FILTERING.

16. REFERENCES

Please refer to the following e-ProMIS Kenya related documents:

- e-ProMIS Kenya Projects Application User Manual
- e-ProMIS Kenya Technical Assistance Personnel Application User Manual
- e-ProMIS Kenya Organisations Profile Application User Manual
- e-ProMIS Kenya DA1 Form Submission Application User Manual
- e-ProMIS Kenya M&E Results Profile Application User Manual
- e-ProMIS Kenya Administration Center User Manual